



WORKFLOW OVERVIEW

Phone and SMS intake automation

See how an AI-assisted phone call and a text-message conversation become structured client and referral records that staff can review and continue.

1 · CONVERSE

A prospective client calls or texts the clinic using the channel that works for them.

2 · CAPTURE

The transcript or message thread keeps the original intake details visible.

3 · CREATE

An applied automation creates the client file and an unassigned referral.

4 · CONTINUE

Staff review the result, then choose assignment and booking steps.

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● AI-ASSISTED PHONE INTAKE

Open the completed inbound call

Olivia Bennett's call is linked to her contact and includes a concise summary of her motor vehicle accident, ICBC funding, and request for an in-home occupational therapy assessment.

The screenshot displays the InToday web app interface, which is divided into several sections:

- Header:** Includes navigation tabs for "InToday" and "Conversations", a search icon, a grid icon, a notification bell with "99+", and a user profile for "Jordan Avery".
- Left Sidebar:** Contains a "Conversations" section with a "Filter loaded" button and a list of filters: "All", "New Referral", "WSBC / ICBC Claim", "Billing Question", "Discharge Follow-up", and "Pharmacy Delivery". Below this is a "MY QUEUE" section with options like "Everything", "Assigned to me", "Unassigned", "All team", "Snoozed", and "Closed". A "NARROW WHAT'S LOADED" section includes "No filter", "Needs a reply" (13), and "Missed calls" (1).
- Conversations List:** A central list of conversations. The selected conversation is for "Olivia Bennett" (+1 (778) 555-0301), marked as "Client". Other conversations include "Ethan Cole", "Casey Morgan", and several other numbers.
- Conversation Detail View:** The right side of the interface shows the details for the selected conversation. It includes a "CONTEXT" section with "AI handling" (Off), "Draft only", "Send after hold", and "Full auto". Below this is an "AI SUMMARY" section stating: "Olivia requested an in-home OT assessment after an MVA. ICBC is the funder. Contact details were confirmed and the intake was prepared for staff review." There is a "View transcript" link. At the bottom, there are buttons for "Tell AI", "Reply", and "Comment".
- Right Sidebar:** Contains a "Summary" section (Not generated yet), a "Context" section (Client: Olivia Bennett, Saved contact: Olivia Bennett, Email: olivia.bennett.call@sunrise-demo.example, Last heard from: 6:59 PM, Last reply sent: No reply sent yet, Tags: None, Next visit, claim and balance are not in this response), and a "Channels" section (Calls: 1).

Review the source transcript

The transcript preserves what Olivia and the AI assistant said: her name, contact details, ICBC context, requested profession, and in-home service preference.

The screenshot displays the InToday web app interface, specifically the 'Conversations' section. The top navigation bar includes 'InToday' and 'Conversations' tabs, a search icon, a grid icon, a notification bell with '99+', and a user profile for 'Jordan Avery'. Below the navigation bar, the 'Front Desk (Fake)' section shows a filter for '+1 (500) 555-0101' and a search for 'Everything' with 'No filter' applied. The 'Conversations' list on the left includes a 'MY QUEUE' section with 'Everything' selected, and a 'NARROW WHAT'S LOADED' section with 'No filter' selected. The main conversation list shows several entries, with 'Olivia Bennett' (+1 (778) 555-0301) selected. The conversation details for Olivia Bennett are shown in the center, including a 'Filter loaded' section with 'All' selected, a 'New Referral' button, and a 'Discharge Follow-up' button. The conversation transcript shows Olivia requesting an in-home OT assessment after an MVA, and the AI assistant confirming the intake and preparing for staff review. The transcript also shows Olivia providing her name, email, and phone number, and the AI assistant confirming the information and creating the client file. The right sidebar contains a 'CONTEXT' section with 'AI handling' set to 'Off', a 'Summary' section with a 'Generate summary' button, and a 'Channels' section with 'Calls' selected. A 'Feedback' button is visible on the right side of the transcript.

Conversations

MY QUEUE

- Everything
- Assigned to me
- Unassigned
- All team
- Snoozed
- Closed

NARROW WHAT'S LOADED

- No filter
- Needs a reply (13)
- Missed calls (1)

Conversations

Filter loaded

All New Referral WSBC / ICBC Claim Billing Question

Discharge Follow-up Pharmacy Delivery

All Texts Calls

+1 778-555-0100 Oct 2

You: Please arrive 10 minutes early next visit to c...
Unknown number

EC **Ethan Cole** 7:17 PM

Private Pay works. Please create the file and re...
+1 (778) 555-0302 Client

OB **Olivia Bennett** 6:59 PM

3:04 Client
+1 (778) 555-0301 Client

CM **Casey Morgan** 6:45 PM

I need to review the appropriate client file befo...
+1 (778) 555-0999 2 clients

+1 778-555-0110 2:47 AM

What time works for a follow-up call this week? ...
Unknown number

+1 778-555-0102 Sep 29

Hi, is it possible to move my appointment this ...
Unknown number

+1 778-555-0106 Sep 24

Thank you for the visit today, really appreciate...
Unknown number

+1 778-555-0112 Sep 24

Is there any update on the insurance authoriza...
Unknown number

+1 778-555-0202 Sep 20

6:35

Olivia Bennett
+1 (778) 555-0301

Unassigned Close Snooze

Cleaned Raw

AI assistant

Thank you for calling Sunrise. How can I help today?

Olivia Bennett

I was in a motor vehicle accident and ICBC asked me to arrange an occupational therapy assessment at home.

AI assistant

I can start that intake. May I confirm your name, email, and the best number for the clinic to use?

Olivia Bennett

Olivia Bennett, olivia.bennett.call@sunrise-demo.example, and this number is best.

AI assistant

Thank you. I have enough information to create the client file and prepare an unassigned ICBC OT referral for the

Tell AI Reply Comment

No skill matches yet Create skill

Tell the AI what to do... press Enter to launch

Runs a skill on this conversation. You approve before anything sends.

CONTEXT

AI handling · this line Read-only

Off

Draft only

Send after hold

Full auto

No rung is chosen, so this ladder is not driving anything.

No rung has been chosen for this line. Until one is, hAI keeps replying to texts the way it always has — that is the historical default, not a decision anyone made here.

It shows the control that is coming, not a report of what hAI is doing today. What each rung means is spelled out in Settings → Conversations.

Summary

Not generated yet. hAI can read this conversation's texts and produce a summary, key points and any action items — calls and email aren't included yet.

Generate summary

Context

Client Olivia Bennett

Saved contact Olivia Bennett

Email olivia.bennett.call@sunrise-demo.example

Last heard from 6:59 PM

Last reply sent No reply sent yet

Tags None Add

Next visit, claim and balance are not in this response. The hub reads messages and calls; it does not open a client's schedule or ledger every time you click a row.

Channels

Calls 1

Confirm the applied intake automation

The “Create ICBC OT referral from phone intake” automation records the client and referral creation as a completed, reviewable result. The source conversation remains available beside it.

The screenshot displays the InToday web app interface. On the left is a sidebar with navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is titled "AI" and shows a "New chat" button. Below this, there are sections for "AI sections" (Automations, Review, Rules, Gaps, Dashboard, Map, Scheduled, Conversations, All chats, Cwork, Specialists, Capabilities) and "Recents" (Today, Skill: Create ICBC OT referral from pho..., Skill: Create Private Pay PT referral fro..., Draft care plan for new client). The top right of the interface shows a search bar, a notification bell with "99+", and a user profile for "Jordan Avery".

The main content area displays the automation process for "conversation #7785550301". The automation is labeled "Applied" and "Suggested 1 Oct 2026, 7:22 PM". The "What it did" section states: "These actions were applied. Reversing unwinds them." Below this, the automation details for "conversation #7785550301" are shown, including a "VERIFICATION" section and a list of steps:

- Step 0 Create client — Email → olivia.bennett.call@sunrise-demo.example, Phone → +17785550301, Last name → Bennett, First name → Olivia, Client type id → 46, Created client id → 1999
- Step 1 Create referral — Client

The "Details" section shows the automation rule "Create ICBC OT referral from phone intake" and the subject "conversation #7785550301". The suggested time is "1 Oct 2026, 7:22 PM" and the decided time is "1 Oct 2026, 7:07 PM".

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

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● AI-ASSISTED PHONE INTAKE

Open the new ICBC client record

Olivia's client file includes her claim number, September 18 injury date, contact details, and MVA, in-home OT, and new-referral tags. Staff can review the complete intake context before the referral moves forward.

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 Olivia Bennett, with a claim number of L1005213. The record is categorized by tags: MVA, in-home OT, and New referral. The record is divided into three sections: Contact, Details, and Summary. The Contact section shows Olivia's first and last name, phone number, and email address. The Details section shows her client type as ICBC, billing number as L1005213, date of injury as September 18, 2026, and meet type as Community. The Summary section shows the status as Open and 1 open referral. A 'New Task' input field is at the bottom.

Olivia Bennett
Claim #: L1005213

ICBC **Billing #L1005213**

TAGS: MVA in-home OT New referral

Contact

Firstname	Lastname	Phone	Email
Olivia	Bennett	+1 (778) 555-0301	olivia.bennett.call@sunrise-demo.example

Details

Client Type	Billing Number	Date of Injury	Meet Type
ICBC	L1005213	September 18, 2026	Community

Summary

Open 1 open referral

New Task

Review the unassigned OT referral

The referral carries the occupational therapy requirement, ICBC payer, in-home context, and travel requirement. It is ready for candidate selection, but no provider has been assigned and no appointment has been booked.

The screenshot displays the InToday web app interface for reviewing an unassigned OT referral. The top navigation bar includes a search bar, a user profile for Jordan Avery, and a notification bell with 99+ alerts. The main content area is titled "ICBC OT intake — Olivia ..." and includes a "REFERRAL" tag and an "APPROVAL REQUIRED" status. The interface is organized into several sections:

- Automation:** Off
- Candidates:** No candidates invited yet. A "Manage Candidates" button is available.
- Description:** Phone intake captured after a motor vehicle accident. The client is seeking an in-home occupational therapy assessment. 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-assisted conversations.
- Client:** Olivia Bennett. Contact information: +17785550301, olivia.bennett.call@sunrise-demo.example. PAYER: ICBC.
- Source:** CONTACT: olivia.bennett.call@sunrise-demo.example.
- Assigned Provider:** Not assigned yet. An "Assign" button is available.
- Referral Automation:** A section for automation settings.

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

Review the client's text-message request

Ethan Cole's SMS exchange captures his name, email, Private Pay funding, and request for in-clinic physiotherapy. The full back-and-forth remains visible to the intake team.

The screenshot displays the InToday web app interface for managing SMS conversations. The top navigation bar shows 'InToday' and 'Conversations' tabs. The main header area includes a search bar and a user profile for 'Jordan Avery'.

Conversations List:

- Filter loaded:** All, New Referral, WSBC / ICBC Claim, Billing Question, Discharge Follow-up, Pharmacy Delivery.
- Filter by:** All, Texts, Calls.
- Conversations:**
 - # +1 778-555-0100** (Oct 2): You: Please arrive 10 minutes early next visit to c... (Unknown number)
 - EC Ethan Cole** (7:17 PM): Private Pay works. Please create the file and re... (+1 (778) 555-0302 Client)
 - OB Olivia Bennett** (6:59 PM): 3:04 (+1 (778) 555-0301 Client)
 - CM Casey Morgan** (6:45 PM): I need to review the appropriate client file befo... (+1 (778) 555-0999 2 clients)
 - # +1 778-555-0110** (2:47 AM): What time works for a follow-up call this week? (Unknown number)
 - # +1 778-555-0102** (Sep 29): Hi, is it possible to move my appointment this ... (Unknown number)
 - # +1 778-555-0106** (Sep 24): Thank you for the visit today, really appreciate... (Unknown number)
 - # +1 778-555-0112** (Sep 24): Is there any update on the insurance authoriza... (Unknown number)
 - # +1 778-555-0202** (Sep 20): 6:35

Ethan Cole Conversation Details:

Header: +1 (778) 555-0302. Actions: Unassigned, Close, Snooze.

Messages:

- Ethan Cole - 7:11 PM:** I would like to become a patient for in-clinic physiotherapy. My name is Ethan Cole.
- Jordan Avery - 7:13 PM:** Thanks, Ethan. What email should we use, and will this be Private Pay or insurance funded?
- Ethan Cole - 7:15 PM:** Use ethan.cole.sms@sunrise-demo.example.
- Ethan Cole - 7:17 PM:** Private Pay works. Please create the file and referral.

AI Handling: Off, Draft only, Send after hold, Full auto.

Summary: Not generated yet. hAI can read this conversation's texts and produce a summary, key points and any action items — calls and email aren't included yet. [Generate summary](#)

Context:

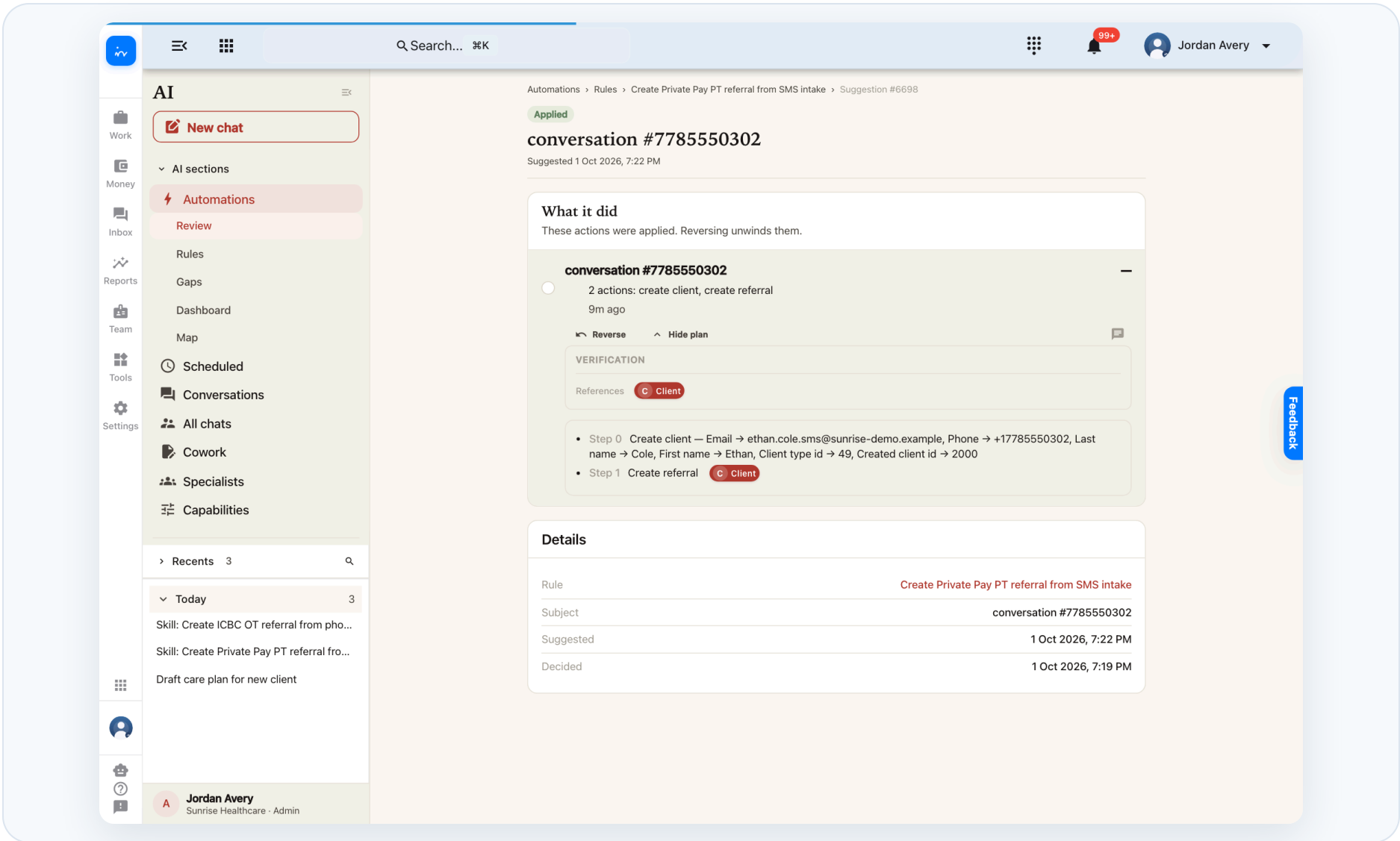
Field	Value
Client	Ethan Cole
Saved contact	Ethan Cole
Email	ethan.cole.sms@sunrise-demo.example
Last heard from	7:17 PM
Last reply sent	7:13 PM
Tags	None · Add

Channels: 4

Feedback: (Vertical button on the right)

Confirm the SMS intake automation

The applied “Create Private Pay PT referral from SMS intake” automation records the two completed actions: create Ethan’s client file and create his referral.



Review the ready physiotherapy referral

Ethan's referral identifies physiotherapy, an in-clinic assessment, and Private Pay. It is ready for staff to assign and book as separate next steps.

The screenshot displays the InToday web app interface for reviewing a referral. The top navigation bar includes a search bar and user profile (Jordan Avery). The main header shows the referral title "Private Pay PT intake — Ethan Cole" with a "REFERRAL" tag and a status bar with "ALL REFERRALS", "EDIT", and "MORE ACTIONS".

The left sidebar contains navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is divided into several sections:

- Automation:** Status is "Off".
- Candidates:** "No candidates invited yet" with a "Manage Candidates" button.
- Description:** "SMS intake for an in-clinic physiotherapy assessment. Referral is ready for staff to assign and book." with an "Edit" button.
- Consult Responses:** "No specialist response recorded yet" with an "Add Response" button.
- Attachments:** "0" attachments with an "Add files" button.
- Activity:** A section for tracking activity.
- AI Conversations:** A section for AI-generated conversations.

The right-hand panel provides details about the client and referral:

- Client:** Ethan Cole, +17785550302, ethan.cole.sms@sunrise-demo.example.
- PAYER:** Private Pay.
- Source:** ethan.cole.sms@sunrise-demo.example.
- Assigned Provider:** Not assigned yet, with an "Assign" button.
- Referral Automation:** A section for managing automation settings.

A "Feedback" button is located on the right side of the main content area.

WHAT THE AUTOMATION DOES—AND WHERE STAFF STAY IN CONTROL

From conversation to a referral that is ready to continue

Original conversation stays visible

The call transcript or SMS thread remains available so staff can verify the information used to create each record.

Structured records are created

Name, contact details, payer, requested profession, service setting, and travel context become usable client and referral data.

Results remain reviewable

The applied automation shows what it created. Clinics can keep new workflows staged for review while they build confidence.

The next step is configurable

Referral assignment can be therapist-led, coordinator-led, or handled by configured automation.

Assignment flexibility. Clinics may 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 to its workflow.

Two conversational paths, two referrals ready for the team



The original interaction remains visible.

Staff can trace each result back to the call transcript or SMS exchange.



The automation's work is reviewable.

Each applied result shows that a client file and referral were created.



Service and payer context carry forward.

ICBC OT and Private Pay PT become distinct, structured referrals.



The clinic chooses what happens next.

Use therapist selection, coordinator assignment, or tailored rules based on availability and capacity.

Explore InToday

Bring phone, SMS, email, online booking, referrals, scheduling, client care, billing, and team workflows together in one platform.

This guide ends when each referral is ready for assignment and booking.

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