Enable or Create a Custom AI Agent

Purpose: Explain how your practice can request, scope, and enable a new custom AI agent in SimboConnect.

Who can request this

- Your practice administrator or front office lead.
- Any staff member may start the request and include the administrator.

How to request

1. Prepare a short description of the task you want to automate.
2. Contact your account manager **or** send an email to **support-connect@simbo.ai**
3. In your message include:
   - The task to automate. Examples: emails, phone calls, letters, language translation, faxes.
   - Whether you want the agent to integrate with your EHR and any other tools.
   - The steps the agent should follow and any rules to follow.
   - Sample inputs and the expected output. If a letter is needed, share the letterhead template.
   - Language needs, if any.
   - Any compliance or privacy notes specific to your practice.

What happens next

1. The Simbo AI team reviews your request and confirms scope.
2. You receive an estimate, a proposed timeline, and any access needs.
3. If integrations are required, you may be asked to provide test access or vendor contacts for your EHR or other systems.
4. The team builds the agent, tests it with sample data, and shares a preview for your approval.
5. After approval, the agent is enabled in your SimboConnect account and your staff receives a quick walkthrough.

Timelines

- Simple, single step agents such as **Custom Letters** are usually completed in a few days.
- Multi step automation such as sending emails and follow up calls will take longer because they include several actions and checks.
- Any agent that requires integration with an **EHR** or other external tools may take more time. The timeline depends on the external vendor and how long it takes to complete the integration work.

Who can use these custom AI Agents in your practice

1. The Simbo AI team can enable these custom AI agents individually to be available for specific users or specific locations or complete organization.
2. Reach out to your account manager and provide details to enable/disable access to the custom AI agents.

After go live

- Share feedback to fine tune prompts, steps, and output formats.
- Ask your account manager if you want the agent added to the **HIPAA Compliant AI Agents** menu for selected roles only.

Tips and good practices

- Describe the desired result first, then list the steps.
- Keep the first version simple. Add advanced steps after the team has used the agent for a week or two.
- Provide real examples, redacted if needed, so the team can test accurately.
- If the agent touches PHI, confirm user roles and audit needs during scoping.

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