# Manage SMS Text Chat With Patients in SimboVara

**Purpose:** This guide explains how to use SimboConnect to send and receive SMS text messages with patients. It covers live chat, pictures, AI extraction from IDs and insurance cards, quick replies with Write with AI and Templates, and basic task management.

## What you can do

- Send SMS messages to a patient directly from SimboConnect.
- Receive live SMS replies from the patient in the same chat panel.
- Receive pictures the patient sends by SMS, view them in the chat, and download them.
- Let AI read pictures of IDs and insurance cards and surface key details for easy copy and paste into your EHR.
- Draft fast, consistent replies with Write with AI or Templates.
- Assign or hand off the conversation as a task, and track its status.

## Open the patient chat

1. Open the patient call, text interaction from the main home screen.
2. Go to the **SMS Chat** icon on top-left side on panel next to "More Info". You will see the message history, patient phone number, and controls such as **Write with AI**, **Templates**, the message text box, and the **Send** button.

> Tip: The chat updates in real time. New patient messages will appear as they arrive.

## Send a text message

1. Click in **Type your message…**.
2. Write your message in simple, clear language.
3. Click **Send**.

The patient will receive the message as a normal SMS on their phone. Their reply will appear in the same thread.

## Receive and manage replies

- New messages appear at the bottom of the thread with a time stamp.
- Use short follow-ups to confirm understanding, availability, or next steps.
- If the topic turns into work for a teammate, use **Assign To** to hand it off and set the **Status** such as Open or Resolved as your workflow requires.

# Handle pictures from patients

Patients can attach pictures in their SMS reply. Examples include a photo of a driver license, an insurance card, a referral, or a wound image.

- **View**: Images appear inline in the chat.
- **Download**: Click the image preview to download the file for your records. Save it based on your clinic policy.

# AI extraction from IDs and insurance cards

When the picture looks like an ID or an insurance card, SimboConnect AI will parse key fields and show them in the chat panel. Examples include:

- Member name
- Policy or member ID
- Group number
- Plan name
- Payer phone number

You can **copy and paste** these details into your EHR or intake forms. Always verify the text against the image before saving.

# Reply faster with Write with AI

**Write with AI** creates a suggested response based on the call or chat context and the patient summary on the screen.

1. Click **Write with AI**.
2. Review the suggested reply.
3. Edit the text for tone and accuracy.
4. Click **Send**.

> Good uses: acknowledging receipt of a document, sharing next steps, confirming a scheduled time, or giving simple instructions.

# Reply faster with Templates

**Templates** are pre-written messages for common situations.

1. Click **Templates**.
2. Choose a template that fits the situation, for example appointment confirmation, document request, or prescription refill instructions.
3. Personalize the placeholders if needed.
4. Click **Send**.

> Tip: Keep templates short and action oriented. Add a direct question if you need the patient to confirm or provide something.

# Assign, track, and resolve

SMS conversations can create tasks. You can manage them in the same panel.

- **Assign To**: Route the conversation to a specific teammate or queue.
- **Status**: Mark the thread **Open** while work is in progress. Mark it **Resolved** when finished.
- **Audit Trail**: Use the audit trail to see who sent which message and when.

This keeps ownership clear and helps your team respond on time.

# Best practices

- Keep messages short. Use one message per question or action.
- Confirm identity before sharing sensitive information, following your clinic policy.
- Verify AI-extracted fields against the image before updating the EHR.
- Use Write with AI for speed, then edit for accuracy.
- Use Templates for consistency across the team.
- Close the loop. Mark the conversation **Resolved** when the patient has what they need.

# Troubleshooting

- **Patient did not receive the SMS**
  - Confirm the patient phone number in the patient info panel.
  - Send a short test message such as “Testing your clinic message service. Please reply YES if you received this.”

- **Picture is blurry or unreadable**
  - Ask the patient to retake the photo in good light and fill the frame with the card.
  - Ask for front and back if it is an insurance card.

- **AI did not extract fields**
  - Copy the details manually from the image this time.

- Ask for a clearer picture. AI extraction works best with sharp, well-lit images.

# Summary

With SimboConnect, your front office can handle SMS conversations in one place. You can send and receive texts in real time, accept and download patient pictures, use AI to extract key fields from IDs and insurance cards, respond quickly with Write with AI and Templates, and assign or resolve the work as a task. This keeps your patient messaging fast, accurate, and easy to manage.

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