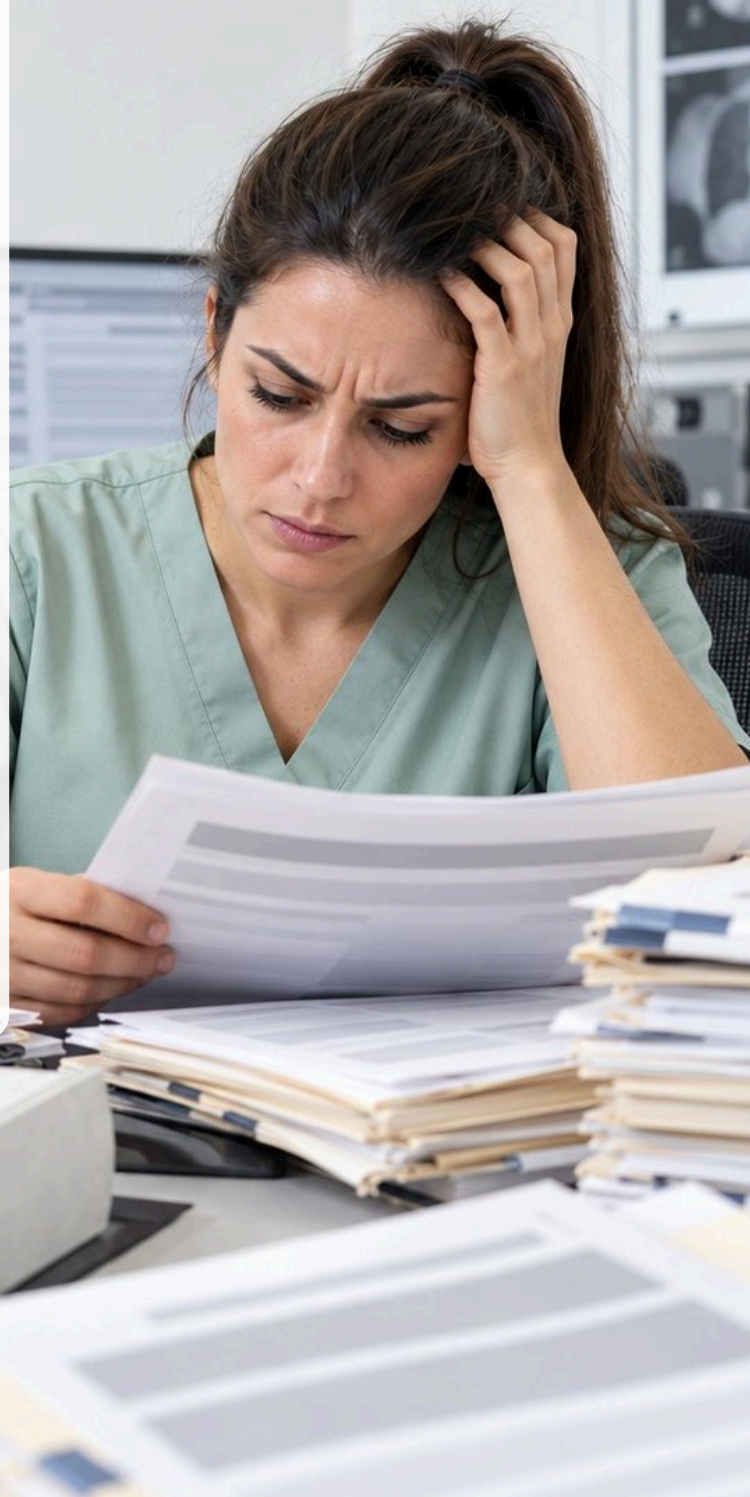


# Retyping reports instead of coding cases?

## From now on, every document arrives already read.

Referrals, medical reports, lab results, consent forms and discharge summaries, often in a single scan. This guide shows how PaperOffice splits, recognizes, reads and securely stores your patients' documents, so admissions and coding can check instead of search.



TRY IT YOURSELF IN 45 MINUTES

Four invented files from admissions and the ward: an admissions stack with a blank page, a phone photo, an email from the lab and a discharge summary. Includes a test package to follow along.

## WHY THIS GUIDE

# Time isn't lost in coding. It's lost in gathering.

Patients bring what they have: a referral, prior findings, insurer forms. Before anyone can work with them, someone has to sort them first.



In many hospitals, the day starts at admissions with the scanner and ends in coding with the search for the last lab result. In between, pages are separated, names retyped and copies blacked out by hand.

This guide shows how PaperOffice takes over this part: Workspaces for admissions and coding, a Split Agent for admissions stacks, fields with their source location, a folder per patient and redaction before sharing. Medical assessment stays with your team. With the test package, you can try it yourself in 45 minutes.

**Daniel Schönland**

Founder and CEO, PaperOffice



## WHO THIS IS FOR

**Patient admissions**

You receive documents, scan them and transfer the details into the hospital or practice system.

**Coding and billing**

You need a patient's discharge summary, findings and diagnoses complete and legible in one place.

**IT and data protection**

You decide who sees which documents and what may leave the building.

## WHAT YOU CAN DO AFTERWARDS

Create Workspaces, bring in documents by scanner, smartphone and email, split stacks, have types and fields read, see gaps, bundle documents per patient and share them securely.

## OVERVIEW

# Contents

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| 01 | Monday in medical coding              | 04 |
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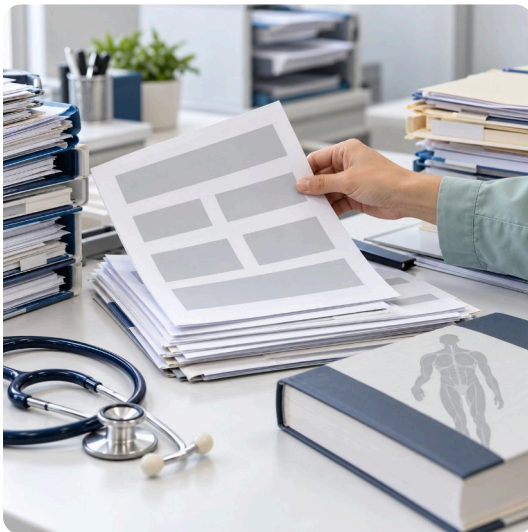
**AT A GLANCE**

- Admissions and coding work in Workspaces of their own, with rights per user group and access protection from Business.
- Documents arrive by scanner, smartphone, upload or email. The Split Agent splits an admissions stack into individual documents.
- AI-DMS recognizes types such as Referral, Medical Report, Lab Result and Discharge Summary. You describe your own types, such as consent forms, in words.
- IDP Agents read name, date of birth and insurer, or the diagnoses of a discharge summary, each value with its source location.
- Document folders bundle a patient's documents. Copies are redacted before sharing or sent with a password.

## 01 · MONDAY IN MEDICAL CODING

# Twenty discharges over the weekend. And every file is different.

Monday, 7:30 a.m. Sandra Krüger is a medical coder in the coding and documentation department of Klinikum Talheide. On her desk are the documents of the patients discharged over the weekend.



Helmut Brandner's file includes a two-page discharge summary, the lab result from the day of admission and an X-ray report from radiology. The referral from his family doctor carries a handwritten note. Everything arrived at the admissions desk of the outpatient center as a single scan, with a blank page in the middle.

The lab result after surgery came by email. And a study at the hospital asks for a copy of the discharge summary, without name and address.

## THE REAL HURDLE

Coding can start once all of a patient's documents are separated, legible and in one place. That is where most of the time goes.

## 02 · WHAT HOLDS DOCUMENTS UP

# Four time sinks. Each one small on its own.

Hardly any document is difficult on its own. The time goes into the fact that they arrive in every form and have to be put in order first.

## One scan, many documents

Admissions scans everything a patient brings in one pass. Where the referral ends and the prior findings begin becomes clear to whoever pages through it.

## Every practice writes differently

Name, date of birth and insurer sit in a different place on every form, sometimes added by hand. They still get retyped.

## Searching before coding

Discharge summary, findings and referral sit in the inbox, the scan folder and the files. Whoever codes has to gather them first.

## Sharing calls for care

For studies or case reviews, copies are blacked out with a marker and scanned again. One spot is easily missed.

| TIME SINK                         | HOW PAPEROFFICE HELPS                                                          | IN THE TEST PACKAGE                       |
|-----------------------------------|--------------------------------------------------------------------------------|-------------------------------------------|
| One scan, many documents          | The Split Agent splits the stack and removes blank pages                       | 7 pages with 4 documents and a blank page |
| Every practice writes differently | An IDP Agent reads your fields by content, each value with its source location | Referral with a handwritten note          |
| Searching before coding           | One document folder per patient; "Read folder" shows all pages in one go       | Helmut Brandner's documents               |
| Sharing calls for care            | Redaction with preview in a copy, sending with a password by SMS               | Discharge summary for a study             |

All patients, practices, insurers and values in the test package are fictional.

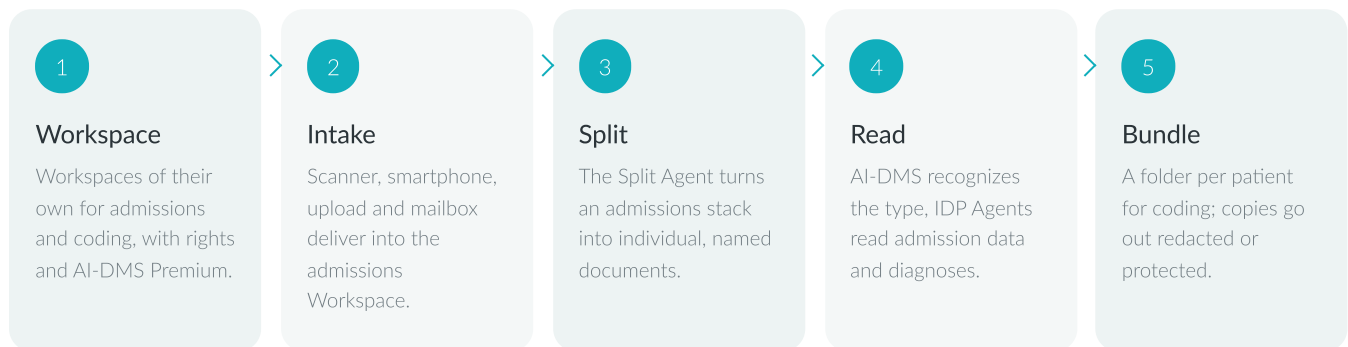
## WHAT REMAINS IN YOUR HANDS

Medical assessment, coding and the decision about what leaves the building. PaperOffice prepares the documents and shows what is missing.

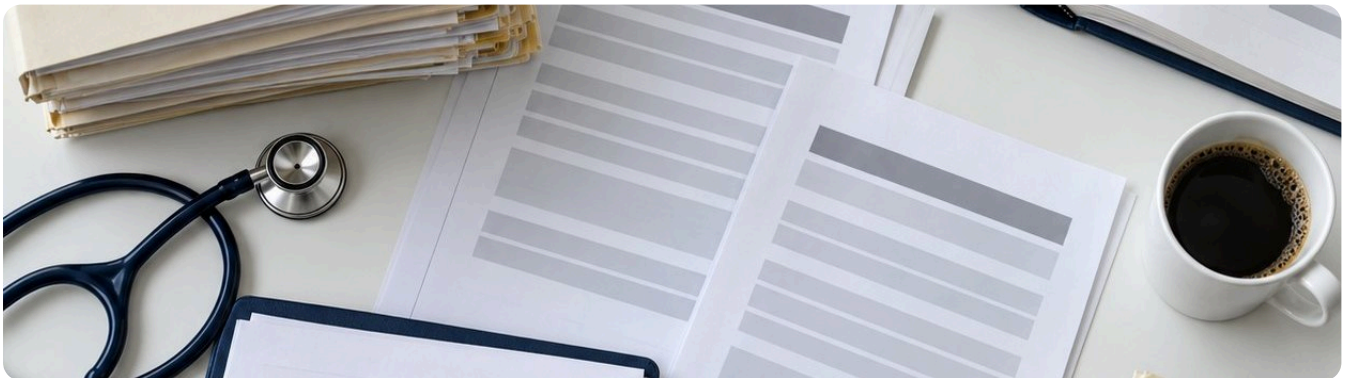
03 · THE PROCESS AT A GLANCE

# Five stations. From admissions to coding.

Every document follows the same path, whether it is scanned, photographed or arrives by email.



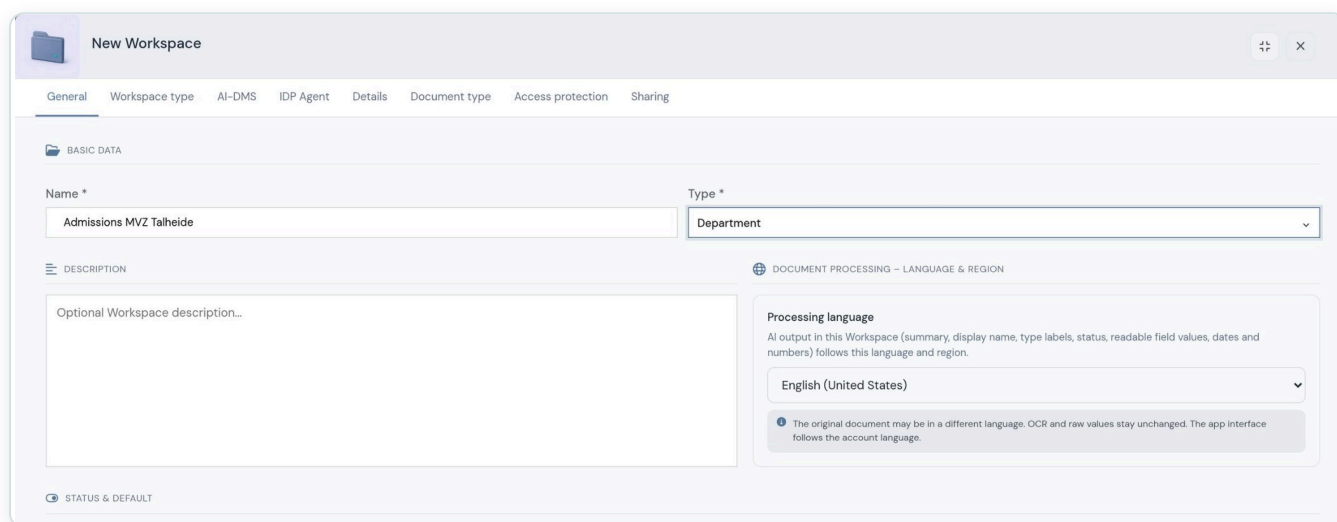
| STATION   | WHAT PAPEROFFICE DOES                                | WHAT YOUR HOSPITAL DECIDES              |
|-----------|------------------------------------------------------|-----------------------------------------|
| Workspace | separates areas, checks rights and access protection | which group sees which Workspace        |
| Intake    | accepts scans, photos, files and emails              | which channels admissions and wards use |
| Split     | detects document boundaries, removes blank pages     | rule, filenames and target Workspace    |
| Read      | type, patient name, date of birth, diagnoses         | which fields are required               |
| Bundle    | folder per patient, redaction, secure delivery       | who reviews and what may go out         |



## 04 · WORKSPACES FOR ADMISSIONS AND CODING

# One Workspace per area. With rights of its own.

Under **Document AI** > **Workspaces**, click **Create New Workspace**. In the “General” tab, choose the name and type; the other tabs control processing and protection.



- Create.** Name “Admissions MVZ Talheide”, type “Department”. For coding, the type “Billing” fits; for patients with long treatment, a Workspace of their own with the type “Patient”.

| WORKSPACE               | TYPE       | WORKSPACE TYPE | AI-DMS  | USER GROUP AND RIGHT                 |
|-------------------------|------------|----------------|---------|--------------------------------------|
| Admissions MVZ Talheide | Department | Business       | Premium | Admissions: View + Download + Upload |
| Coding & Billing        | Billing    | Business       | Premium | Coding team: Full access             |
| Study Outbox            | Research   | Business       | Premium | Study team: View + Download          |

## Workspace type Business

Unlocks details, the trash, access protection and external sharing. Compliance adds a watermark with the user and time of access.

## Access protection

In the “Access protection” tab, set a Workspace password in addition to login, or an SMS code each time the Workspace is opened.

## Rights per group

Assign them under User Groups in the “Workspaces” tab. The server checks them on every call, in the app, via REST API and over MCP.

## 05 · BRINGING DOCUMENTS IN

# Four ways in. All into the admissions Workspace.

In the Workspace, click **Add document**. Next to the “File” tab you will find “Mobile devices” and “Scanner”. You can upload emails as .eml files or fetch them from a mailbox via a Connector.

### How document scanning works

Set up a Scanner Endpoint once. After that, new scans appear directly in this upload dialog.

- Set up Scanner Endpoint**  
PaperOffice provides SFTP and Legacy FTP for the scanner.
- Set target folder /inbox**  
Enter exactly /inbox as the target folder on the scanner.
- Scan and import**  
New files appear here automatically and can be uploaded directly.



**No enabled scanner source found.**  
Set up a PaperOffice Scanner Endpoint and enable it as a scanner source.

[+ Set up Scanner Endpoint](#)

- Scanner at admissions.** Under “Set up Scanner Endpoint”, choose SFTP or Legacy FTP once and enter exactly /inbox as the target folder on the scanner. New scans then appear in the upload dialog and can be uploaded directly.

## Smartphone

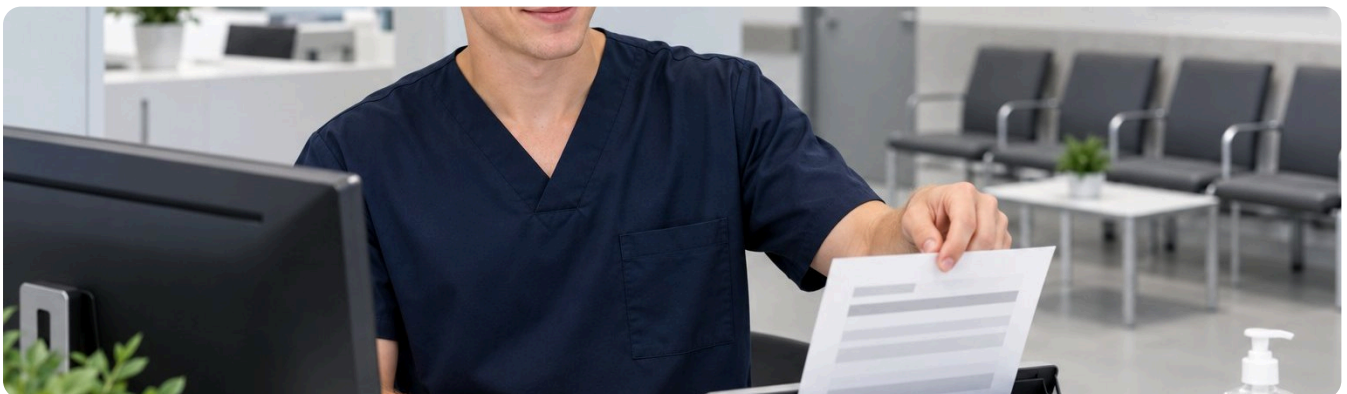
In the “Mobile devices” tab, scan the QR code with the camera app. Photos then go straight into this Workspace, such as a referral a patient brings along.

## Results mailbox

Under **Document AI** > **Connectors**, connect a mailbox (IMAP). New emails arrive in the target Workspace, attachments as documents of their own.

## Upload

Drag files into the dialog, including saved emails as .eml. Every file runs through the Workspace's AI-DMS tier.



One scan per patient.  
Individual documents afterwards.



New Split Agent

GeneralSplit methodFilename & metadataStorage targetAI-DMSIDP Agent

⚡ Rule shortcuts

✂ Automatic

📁 Entity file

📄 Case cover

🔗 Doc type

🔌 Separator

📖 Every N pages

🛠 Custom

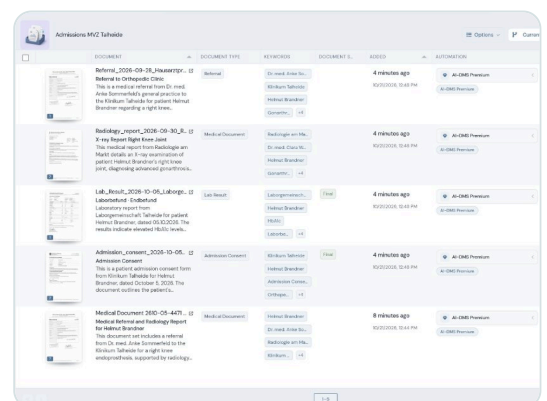
✎ Custom split rule

Automatic detection is used. PaperOffice AI detects document boundaries from visible content, sender, date, layout changes and document type. Attachments, backsides, tables, conditions and continuation pages remain with the current document when they belong together. Filenames are created from the selected pattern and configured output language.

📖 Optimized instructions

```
{
  "version": 2,
  "source": "ui_auto_preview",
  "optimized_language": "en",
  "split_method": "auto",
  "mode": "custom_boundary_policy",
  "split_fixed_pages": 0,
  "user_instruction": "Automatic detection is used. PaperOffice AI detects document boundaries from visible content, sender, date, layout changes and document type. Attachments, backsides, tables, conditions and continuation pages remain with the current document when they belong together. Filenames are created from the selected pattern and configured output language.",
  "start_page_rule": "A new output PDF begins when content, sender, date, layout or document type clearly indicates a new business document.",
  "attachment_rule": "Attachments, backsides, tables, conditions and continuation pages remain with the current output PDF when they belong to the same document.",
  "do_not_split_rule": "No split occurs for minor layout changes, page numbers, table continuations or attachments that belong to the current document.",
  "filename_pattern": "DocumentType_Date_Sender",
  "filename_fields": {
```

- 1 **Filename:** in the “Filename & metadata” tab, the preselected “Standard” template, `DocumentType_Date_Sender`.
- 2 **Storage target:** “Existing Workspace”, here “Admissions MVZ Talheide”. Add “Review uncertain boundaries” with a review queue.
- 3 **Start:** select the stack, `Actions` › `Agents & workflows` › `Split`, then “Run via Split Agent”.



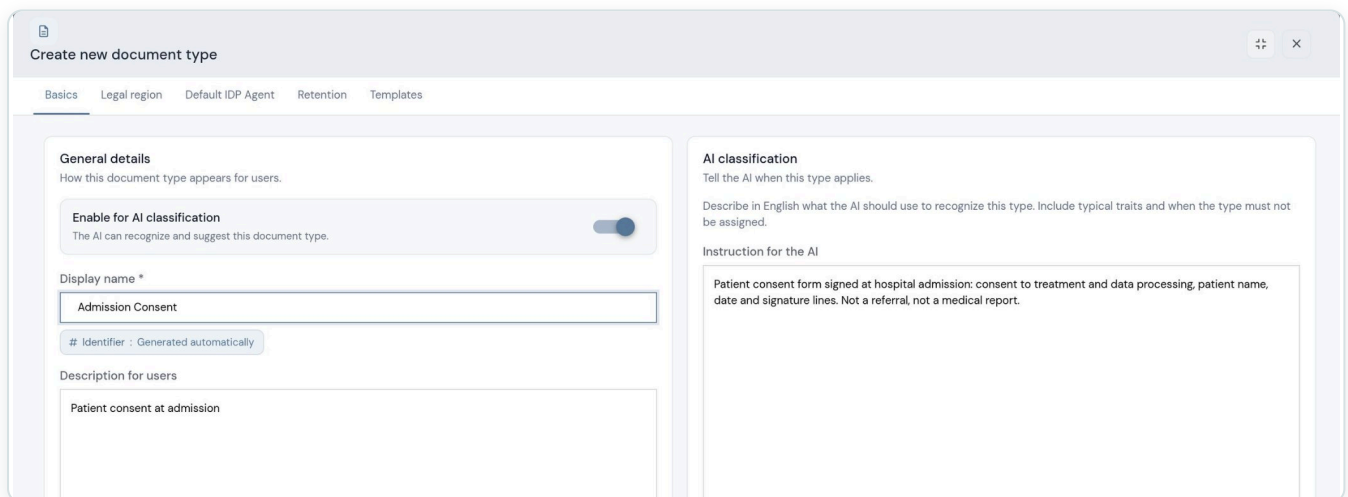
Blank pages are removed; pages with a stamp, signature or note stay. The original stack stays in the Workspace, and the parts run through AI-DMS processing there. If two documents end up in one part, delete the parts and run the Split Agent again.

## 07 · RECOGNIZING DOCUMENT TYPES

# Referral, findings, report. Every document with a type.

With AI-DMS, every document gets a type, a descriptive name and a summary. You will find the catalog under [Document AI](#) > [Document Types](#) .

| TYPE IN THE CATALOG      | TYPICAL IN HOSPITALS AND PRACTICES                                       |
|--------------------------|--------------------------------------------------------------------------|
| Referral                 | referral form from a family doctor or specialist practice                |
| Medical Document         | findings from a department; in the test, the X-ray report from radiology |
| Lab Result               | values from the lab                                                      |
| Discharge Summary        | report from the ward at the end of the stay                              |
| Prescription · Sick Note | prescription and certificate from the practice                           |
| Other / Uncategorized    | when no type fits with enough certainty                                  |



**Create new document type**

Basics Legal region Default IDP Agent Retention Templates

**General details**  
How this document type appears for users.

**Enable for AI classification**  
The AI can recognize and suggest this document type. ☒

Display name \*  
Admission Consent

# Identifier : Generated automatically

Description for users  
Patient consent at admission

**AI classification**  
Tell the AI when this type applies.

Describe in English what the AI should use to recognize this type. Include typical traits and when the type must not be assigned.

Instruction for the AI  
Patient consent form signed at hospital admission: consent to treatment and data processing, patient name, date and signature lines. Not a referral, not a medical report.

- Your own type "Admission Consent".** Under "New document type", enter the display name and the "Instruction for the AI" in English: typical traits and how to distinguish similar types. You do not need sample documents for this. In the test, the consent form from the stack then carried this type.

## Correct a type

If a type does not fit, change it on the document in the "Properties" tab.

## Visual traits

Visual traits such as color, subject or a photo are used in classification when the document is processed with AI-DMS Premium or Ultra.

08 · READING ADMISSION DATA

# Name, date of birth, insurer. Every value with its source.

Select a referral, [Actions](#) > [Agents & workflows](#) > [IDP](#), then “Create new agent”, the template “Free template (Vision)” and “Create agent”. In the editor, add each field with “New field” and describe what should be read.

The screenshot shows the 'AI-IPD' editor interface with three main panels:

- FIELD DEFINITION:**
  - Field label:
  - Keyname:
  - Category:
  - Field type:
  - Search scope (pages):
  - LLM prompt templates:
- ADVANCED VALIDATION:**
  - Validation method:
  - Pattern (regex):
  - 
  -
- Without a regex pattern or allowed values, no validation is performed.

- BEHAVIOR WHEN VALUE IS MISSING:**
- The AI finds no value on the document. The field is marked missing for filters/KPIs as required HITL. A review queue is created only when a HITL agent is bound or legacy triggers match.

Example: Invoice number illegible → field missing, required badge. Queue only with a bound HITL agent or legacy trigger.
- 
- 
- 
-

At the bottom, there is a text area for 'Describe in natural language what should be extracted from this field' with the value: 'Health insurer (Kostenträger) of the patient as written on the referral'.

1 **Fields in your own words.** For each field, a field label, a field type and a description of what to read. Under “Behavior when value is missing”, patient name, date of birth and insurer are set to “Required — HITL review”, which is how the editor creates new fields. For practice, diagnosis and ICD-10 code, “Soft HITL review” is enough.

1 **Test:** “Start full test run” shows result, confidence, page and source location for each field, 3, 5 or 10 times in a row if you wish.

2 **Save:** “Save and close”.

3 **Read automatically:** under [Document AI](#) > [Document Types](#), use “Bind IDP Agent” on the type “Referral” and select the agent as Default IDP Agent. Once AI-DMS recognizes a referral, it is read.

The screenshot shows the 'AI-IPD' result view with the following extracted data:

- Date of birth: 03/14/1958
- Diagnosis on referral: Gonarthrose rechts
- ICD-10 code: M17.1
- Insurer: Musterkasse Nord
- Patient name: Brandner, Helmut
- Referring practice: Hausarztpraxis Dr. med. Anke Sommerfeld

In the “Data Fields” tab, each value comes with the snippet of the document it was read from. The agent reads what is on the document. Medical assessment and coding stay with your team.

09 · DISCHARGE SUMMARIES FOR CODING

# Diagnoses as in the report. Coding stays with you.

A second IDP Agent reads the discharge summary: case number, admission and discharge date and the diagnoses as a table, with the code as stated in the report.

The screenshot shows a discharge summary report on the left and a coding interface on the right. The report includes patient information, admission and discharge dates, and a list of diagnoses with their ICD-10-GM codes. The coding interface on the right has fields for Admission date, Case number, Discharge date, and a Short summary. Below these fields is a table of diagnoses with columns for Diagnosis and ICD Code.

| Diagnosis                    | ICD Code |
|------------------------------|----------|
| 1 Primäre Gonarthrose rechts | M17.1    |
| 2 Essentielle Hypertonie     | I10.90   |
| 3 Diabetes mellitus Typ 2    | E11.90   |

- 1 The discharge summary from the test package. Set the column headers in the column definition after the test run. The "Diagnoses" table has a diagnosis and ICD code in each row, such as M17.1. "Copy for Excel" above the table copies all rows.

The screenshot shows the Admissions MVZ Talheide interface. It displays a list of documents with columns for Document, Document Type, Keywords, Document Status, Added, and Automation. A document titled "Referral MVZ Talheide 2026-10-13.jpg" is highlighted.

- 2 "IDP Review" view. Under Options > IDP Review, it shows documents with missing or incomplete fields, such as the phone photo on which the insurer is missing.

## Review task for gaps

On the agent, choose a queue under "Review queue when required fields are missing", created under Workflow AI > HITL Agents. Review tasks are included in the Professional plan.

## Handwriting

AI-OCR reads handwritten notes at the Ultra tier, line by line with position. For such fields there is the "Handwriting" field type. Check the value in the original.

## 10 · BUNDLING DOCUMENTS PER PATIENT

# One folder per patient. Read all pages in one go.

Select a patient's documents, then **Actions** › **Document folder** › **New Folder** . Or drag one document onto another and choose “Create document folder”.

**Brandner, Helmut · Case 2026-104733**  
4 documents · 28/09/2026 – 05/10/2026 · 6 pages

**1. Entlassungsbericht\_Brandner.pdf**  
28/09/2026  
Referral\_2026-09-28\_Hausarztpraxis\_Dr\_med\_Anke\_30/09/2026  
Radiology\_report\_2026-09-30\_Radiologie\_am\_Markt.pdf  
05/10/2026  
Lab\_Result\_2026-10-05\_Laborgemeinschaft\_Talheide.pr

1 / 4 · Discharge Summary · 2 pages  
**Entlassungsbericht\_Brandner.pdf** [Open document](#)

**Klinikum Talheide**  
Klinik für Orthopädie

Am Klinikum 1 · 99999 Talheide  
Sekretariat Tel. 040 66969 210  
Fax 040 66969 211  
orthopaedie@klinikum-talheide.example

Klinikum Talheide · Klinik für Orthopädie · Am Klinikum 1 · 99999 Talheide

**Hausarztpraxis**  
Dr. med. Anke Sommerfeld  
Am Brunnen 3  
99999 Talheide

|            |             |
|------------|-------------|
| Fallnummer | 2026-104733 |
| Aufnahme   | 05.10.2026  |
| Entlassung | 14.10.2026  |

- 1 **Helmut Brandner's folder** in the “Coding & Billing” Workspace, after the parts were moved there from admissions. The book icon in the folder row, “Read folder”, shows all pages of all documents in one go, with a table of contents on the left: discharge summary, referral, X-ray report and lab result.

### Search

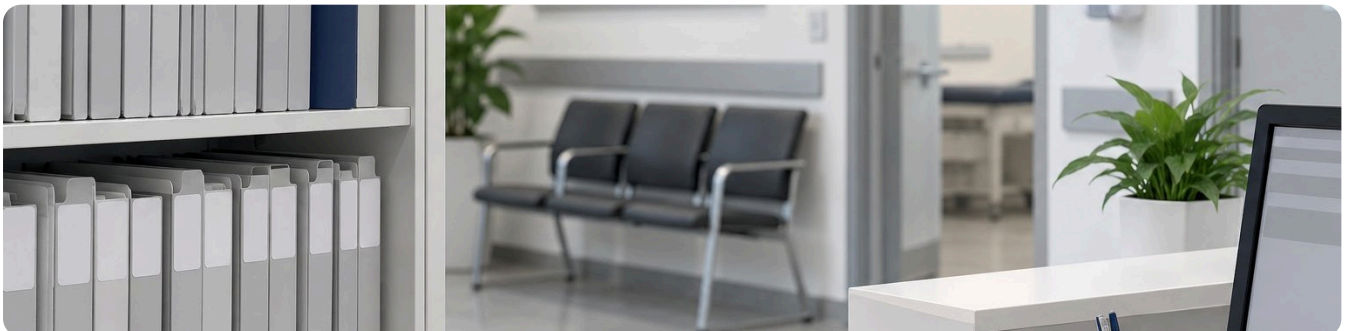
Enter the name or case number in the search bar, scope “All Workspaces”. The text from scans is found too, in the Workspaces you have rights for.

### Move

Finished documents go from admissions to coding via “Actions” › “Selected documents” › “Move”.

### An aid to order

The folder groups documents in the Workspace. Each document stays intact on its own, with its type and fields.



## 11 · REDACTING BEFORE SHARING

# The study gets the report. Without name and address.

Select the document, [Actions](#) › [Agents & workflows](#) › [Redact](#), then “Edit with preview”. You choose a scenario, check every marked area and apply the redaction.

- 1 **Preview before applying.** Scenario “Custom” with Names, Addresses, Dates of Birth and Phone Numbers, plus the case number as an additional term in the Blacklist. Clicking an area redacts or releases it; then “Apply redaction”. In the test, the AI also marked the family doctor and the admission date in the text.

| SCENARIO            | WHAT IS REDACTED                                             | GOOD FOR                                            |
|---------------------|--------------------------------------------------------------|-----------------------------------------------------|
| Medical Records     | all personal and medical data                                | copies that should reveal nothing about the patient |
| Scientific Research | direct and indirect identifiers, plus health data            | full anonymization                                  |
| Custom              | the data types you choose, for example without “Health Data” | studies in which diagnoses should stay legible      |

### THE ORIGINAL STAYS UNCHANGED

The redacted copy is saved in the current Workspace, and the text under every redaction is removed. Check every marked area beforehand, including diagnoses: whatever the AI marks as health data, PaperOffice does not release on its own. Whether the copy is sufficient for your study is for your study lead to assess.

12 · SENDING SECURELY AND HANDING OVER

# A link instead of an attachment. Fields into your own system.

Your hospital or practice information system remains the system for treatment and billing. PaperOffice delivers documents and extracted fields to the people and systems your hospital works with.


**Send by email**  
 Send selected original files by email. PDFs receive a password (email or SMS); the recipient downloads via a secure link — no additional portal code.

Entlassungsbericht\_Brandner\_redacted


**RECIPIENT & MESSAGE**

Recipient email \*

Recipient name

Subject


**SECURE ACCESS**


**PDF password by email** DEFAULT  
 The recipient receives the link and the PDF password in the same email. Opening the link and every download are logged.


**PDF password by SMS** HIGHER SECURITY  
 The recipient receives the link by email; the PDF password is sent separately by SMS. Opening the link and every download are logged.

- 1 **Secure delivery.** Select up to ten documents, [Actions](#) › [Share & export](#) › [Send by email](#) . The recipient gets a link; with "PDF password by SMS", the PDF password goes separately to their phone. Then "Send now".

| PATH              | HOW IT WORKS                                                                        | GOOD FOR                              |
|-------------------|-------------------------------------------------------------------------------------|---------------------------------------|
| Send by email     | link with an expiry date, password by email or SMS, delivery history with proof PDF | copies for a study team or a practice |
| Data field export | JSON, CSV or Excel; tables via "Copy for Excel"                                     | manual transfer                       |
| REST API          | POST /documents/idp-agent-run starts an agent; you fetch the fields with an API key | connecting a HIS or PMS               |
| MCP               | tool po_documents_idp_agent_run for AI assistants                                   | queries with Workspace rights         |

## Delivery status

"Show delivery status" on the document and the delivery history show when the link was opened and the file was downloaded.

## Revoke

If something changes before pickup, "Revoke" blocks the link immediately. The revocation is recorded in the delivery's log.

# Seven questions before your first stack.



## Does PaperOffice code diagnoses?

PaperOffice reads what is in the document, such as a diagnosis or an ICD code, if you describe it as a field, each with its source location. Medical assessment and coding stay with your team.

## Do we need a template for every practice?

An IDP Agent reads your fields by content instead of fixed positions. Test it with referrals from several practices and repeat the test run to see whether the values stay stable.

## Are handwritten notes read?

Yes, with AI-OCR at the Ultra tier. Check hard-to-read spots in the original before a value goes into the hospital system.

## How do the details get into our HIS?

As an export of the data fields in JSON, CSV or Excel, via REST API with POST `/documents/idp-agent-run`, or through the MCP tool `po_documents_idp_agent_run`.

## Who sees which documents?

You assign rights per Workspace and user group: View + Download, plus Upload, or Full access. From Business, a Workspace can ask for a password or SMS code before it opens.

## Who assesses data protection?

Your data protection officer. Show them Workspace rights, access protection and redaction scenarios before real patient documents are processed.

## What does it cost?

You pay for what you process, depending on the tier. The pricing page lists the tiers: [paperoffice.ai/en/pricing](https://paperoffice.ai/en/pricing). Review tasks are included in the Professional plan.

14 · TRY IT YOURSELF IN 45 MINUTES

# Download the test package. Walk through two patients.

Four invented German files from admissions and the ward show the whole path: from the admissions stack to the redacted copy.

## HEALTHCARE TEST PACKAGE

Four files and a guide (README.txt)

Aufnahmestapel\_Brandner.pdf Batch scan, 7 pages with 4 documents and a blank page  
Handyfoto\_Kowalski.jpg Phone photo of a referral, insurer missing  
E-Mail\_Labor\_Brandner.eml Email from the lab with a lab result attached  
Entlassungsbericht\_Brandner.pdf 2 pages, case number and three diagnoses  
[paperoffice.ai/downloads/paperoffice-ai-test-package-healthcare.zip](https://paperoffice.ai/downloads/paperoffice-ai-test-package-healthcare.zip)



- 1 **Workspaces:** at [app.paperoffice.ai](https://app.paperoffice.ai), create “Admissions MVZ Talheide” (type Department) and “Coding & Billing” (type Billing), Business, AI-DMS Premium.
- 2 **Types and split:** first create your own type “Admission Consent”, then a Split Agent with the target “Admissions MVZ Talheide”, and split the admissions stack (Chapters 07 and 06).
- 3 **Fields:** upload the discharge summary to “Coding & Billing”. Create an IDP Agent on the referral from the stack and on the report, test each, bind it to its type and run “Apply existing agent” once (Chapters 08 and 09).
- 4 **More intake:** then upload the photo and the email to “Admissions MVZ Talheide” (Chapter 05).
- 5 **Bundle and redact:** move the referral, X-ray report and lab result to “Coding & Billing”, put them into a folder with the report and redact the report with preview (Chapters 10 and 11).

| FILE               | WHAT TO CHECK                                                                                                          |
|--------------------|------------------------------------------------------------------------------------------------------------------------|
| Admissions stack   | Where does the Split Agent split? Is the blank page gone, and does every part carry type, date and sender in its name? |
| Phone photo        | Does Maria Kowalski's referral appear in “IDP Review” because the insurer is missing?                                  |
| Email from the lab | Which type does AI-DMS recognize, and is the lab result in the admissions Workspace?                                   |
| Discharge summary  | Do case number, dates and the three diagnoses match the report, each at its source location?                           |

All patients, practices, insurers, case numbers and values in the test package are fictional. The cost of the test is shown on the pricing page: [paperoffice.ai/en/pricing](https://paperoffice.ai/en/pricing).

15 · [READ MORE](#)

# More on every building block. Datasheets and short guide.

Every module in this guide has a datasheet of its own with features, click paths and technical details. All available as PDF on [paperoffice.ai](https://paperoffice.ai).

## SHORT GUIDE HEALTHCARE

Stacks of referral letters at admissions? Every page arrives separated and read.

Eight pages for a quick overview: the problem, the path with PaperOffice, click paths, an example and a checklist.

[paperoffice.ai/downloads/paperoffice-ai-short-guide-branche-healthcare.pdf](https://paperoffice.ai/downloads/paperoffice-ai-short-guide-branche-healthcare.pdf)



| DATASHEET             | CHAPTER    | LINK                                                                                                                                                                                                      |
|-----------------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Workspaces            | 04         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf</a>                                                   |
| Split Agent           | 06         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-pdf-split.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-pdf-split.pdf</a>                                                     |
| Classification        | 07         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf</a>                                           |
| IDP Agent             | 08, 09, 12 | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf</a> |
| AI-OCR                | 09         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf</a>                                                                 |
| Knowledge Graph       | 10         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-graph.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-graph.pdf</a>                                         |
| Smart Search          | 10         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-smart-search.pdf</a>                                               |
| Secure email delivery | 12         | <a href="https://paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-safe-email-delivery.pdf">paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-safe-email-delivery.pdf</a>                     |

## PRICING

You pay for what you process, depending on the tier. Which tiers and Workspace types your plan includes is shown on the pricing page: [paperoffice.ai/en/pricing](https://paperoffice.ai/en/pricing).

16 · YOUR FIRST RESULTS IN FIVE DAYS

# Start with one admissions desk. Then the whole hospital.

To get started, all you need is the admissions desk of one outpatient center or ward and a set of sample stacks made from your own forms, filled in with invented details.

1

## Day 1 · Workspaces

Create "Admissions ..." and "Coding & Billing": type, Business, AI-DMS Premium, access protection. Set user groups and rights.

2

## Day 2 · Intake

Set up the admissions scanner endpoint, pair a smartphone, connect the results mailbox via Connector.

3

## Day 3 · Splitting and types

Test the Split Agent on five sample stacks, create your own types such as "Admission Consent".

4

## Day 4 · Fields

Create IDP Agents for the referral and the discharge summary, test them several times, bind them to the types and choose a review queue.

5

## Day 5 · Routine

Decide who checks "IDP Review" every day, how folders per patient are named and which redaction scenario applies to studies. Involve your data protection officer.

### MEASURE THESE FOUR VALUES

#### Stacks

Admissions stacks per day  
that are split without rework

#### Zero rework

Share of documents that do  
not appear in "IDP Review"

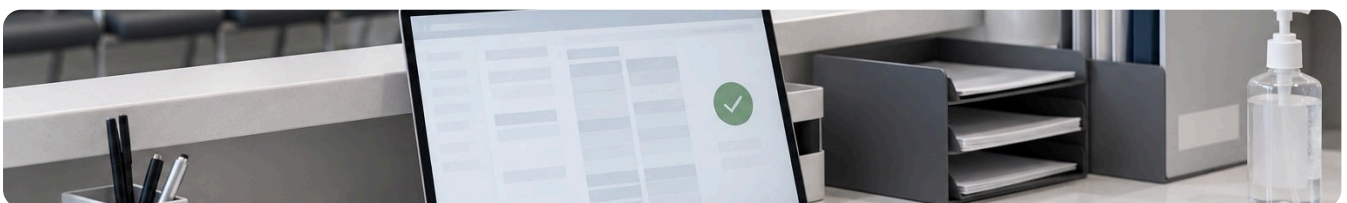
#### Time to coding

Time from discharge until all  
documents are in the folder

#### Retyping

Fields still transferred into  
the HIS by hand

Measure the first week precisely. Comparing it with the following weeks shows how much sorting and retyping is eliminated.



## 17 · CHECKLIST AND START

# Before you expand.

- ☐ Admissions and coding each have a Workspace of their own with suitable user groups.
- ☐ Workspaces with patient documents are Business or Compliance and ask for a password or SMS code.
- ☐ The admissions scanner delivers via SFTP into the /inbox folder.
- ☐ The Split Agent has been tested on five sample stacks made from your own forms.
- ☐ Your own types, such as "Admission Consent", are set up with a short instruction.
- ☐ The IDP Agents for referral and discharge summary are tested and bound to their types.
- ☐ Required fields have a review queue, and someone checks "IDP Review" every day.
- ☐ It is set which redaction scenario applies to studies and sharing.
- ☐ Your data protection officer has reviewed the process, rights and sharing.

**GET STARTED NOW**

Create an account, set up the admissions Workspace, upload the test package. You pay for what you process. [app.paperoffice.ai](https://app.paperoffice.ai)

**THE SOLUTION FOR HOSPITALS, OUTPATIENT CENTERS AND PRACTICES**

Everything about the industry on one page: [paperoffice.ai/en/solutions/industry/ai-healthcare-medical-document-management](https://paperoffice.ai/en/solutions/industry/ai-healthcare-medical-document-management)

**QUESTIONS ABOUT THIS GUIDE?**

Please contact us if you have questions about setup or your processes.

[paperoffice.ai/en/contact](https://paperoffice.ai/en/contact)

As of October 2026. Screenshots are from a test account; scene photos are AI-generated. All examples, patients, practices, insurers and values in this guide are fictional. PaperOffice, paperoffice.ai.