

Claim form, report,
photos: which file is
where?

**Now documents with
the same claim
number stay linked.**

Claim forms, photos, repair estimates, expert reports, and invoices. This guide shows how PaperOffice takes in the documents of a claim, reads them, links them through the same claim number, and checks submitted PDFs, so your team settles claims instead of searching.



TRY IT YOURSELF IN 45 MINUTES

One water damage claim in nine files: a handwritten claim form, photos, a repair estimate, an expert report, invoices, one of them twice, and the policy. Includes a test package to follow along.

WHY THIS GUIDE

The time isn't lost settling claims. It's lost gathering documents.

Many people write about one claim: policyholder, plumber, drying company, and expert. Before anyone can settle it, someone has to pull everything together.

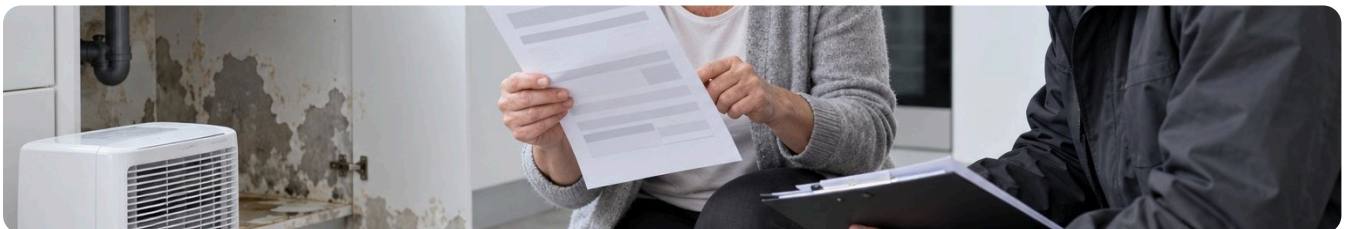


In many claims departments, the work starts with searching. The claim form sits in the incoming mail, the photos hang on an email, the repair estimate is in the scan folder, and the invoice arrives twice. Nobody trained in claims handling to do this.

This guide shows how PaperOffice takes over this part: one Workspace per line of business, all intake channels in one place, claim data as fields, linked documents, and checked PDFs. Every step shows the path in the app, and with the test package you can try it yourself in 45 minutes.

Daniel Schönland

Founder and CEO, PaperOffice



WHO THIS IS FOR

Claims handling

You settle claims and need every document of a case read and in one place.

Field adjusting

You inspect damage, take photos on site, and record claim reports.

Brokers and claims service

You take in your customers' claims and pass the documents on.

WHAT YOU CAN DO AFTERWARD

Create Workspaces per line of business, connect mailbox, scanner, and smartphone, read handwriting, capture claim data as fields, link documents, assign photos, check PDFs, and spot duplicate invoices.

OVERVIEW

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AT A GLANCE

- Each line of business gets its own Workspace with AI-DMS Premium, and a large claim can get one of its own.
- Claims mailbox, scanner, smartphone, and upload all deliver into the same Workspace. Every email attachment becomes a document of its own.
- AI-DMS Ultra also reads handwriting. An IDP Agent captures claim number, policy number, and loss date with their source.
- When AI-DMS reads the same number, written the same way, on several documents, the Knowledge Graph links them. You assign photos with a folder.
- The Trust Agent checks submitted PDFs, and the “Possible Duplicate” hint flags duplicate invoices. Your team makes the decision.

01 · ONE WATER DAMAGE CLAIM, NINE DOCUMENTS

One burst hose. Nine documents in three weeks.

Tuesday, 7:40 a.m. Field adjuster Sven Brodersen stands in Renate Kaltenbach's kitchen in Kiel, Germany. The dishwasher's supply hose has burst, and a dehumidifier is running on the floor.



Ms. Kaltenbach reported the damage by phone and received claim number LW-2026-04711. She fills in the claim form by hand and sends it by mail. She leaves her policy number blank. Mr. Brodersen photographs the floor and the hose.

Then come the drying company's repair estimate by email, the expert report, the plumber's invoice, once as a PDF from the company and once as a phone photo from the customer, and the drying company's final invoice. In one invoice the totals don't add up; in the other, the final total was changed afterward.

THE REAL HURDLE

Claims handler Mira Petersen can only settle the claim once all its documents are together, read, and checked. Most of the time is lost before that point.

02 · WHAT SLOWS CLAIMS HANDLING DOWN

Four time sinks. Each one small on its own.

Hardly any document is difficult. The time goes into the fact that documents come from many senders through many channels and have to be gathered first.

Many senders

Customer, plumber, drying company, and expert send documents in their own formats. The common thread is the claim number, if it's on the document.

Handwriting and photos

Claim forms are filled in by hand, and damage is photographed with a phone. Policy number and loss date get retyped.

Submitted twice

The same invoice comes from the company and from the customer. Whoever enters it twice may settle it twice.

Changed afterward

A PDF can be edited without it showing on screen. A covered amount easily slips through when looking through.

TIME SINK	HOW PAPEROFFICE HELPS	IN THE TEST PACKAGE
Many senders	Claims mailbox, scanner, smartphone, and upload deliver into one Workspace	9 files from 6 senders
Handwriting	AI-DMS Ultra reads the form, an IDP Agent captures the fields	Handwritten claim form, policy number blank
Submitted twice	"Possible Duplicate" hint from AI-DMS Premium	Invoice RE-2026-1093 as a PDF and as a photo
Changed afterward	Trust Agent with finding, page, and text excerpt	Final total covered, transposed digits in a total

Invented claim. The test package contains these cases for you to verify; Chapters 05 to 12 show the paths in the app.

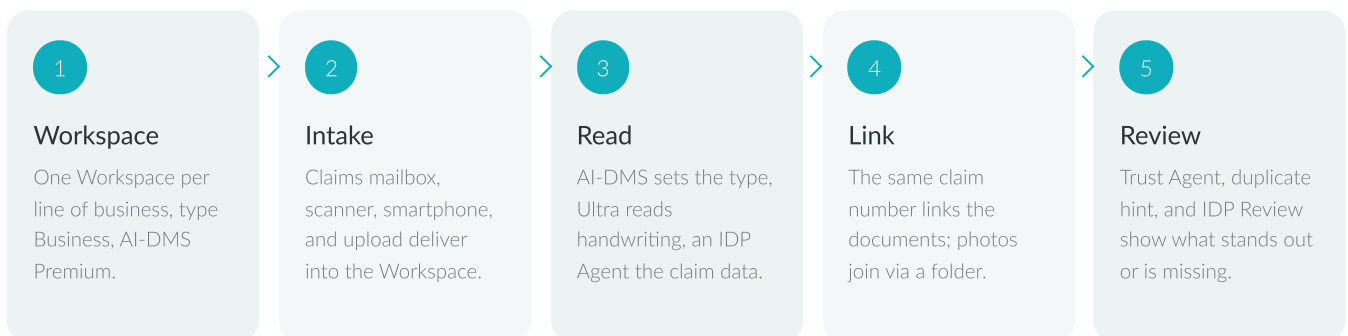
WHAT STAYS WITH YOU

Coverage review, settlement, and payment. Policies, reserves, and payments stay in your policy and claims system. PaperOffice prepares the documents and shows what stands out.

03 · THE PROCESS AT A GLANCE

Five stations. From claim form to review.

Every document follows the same path, whether it arrives by mail, by email, from a smartphone, or as an upload.



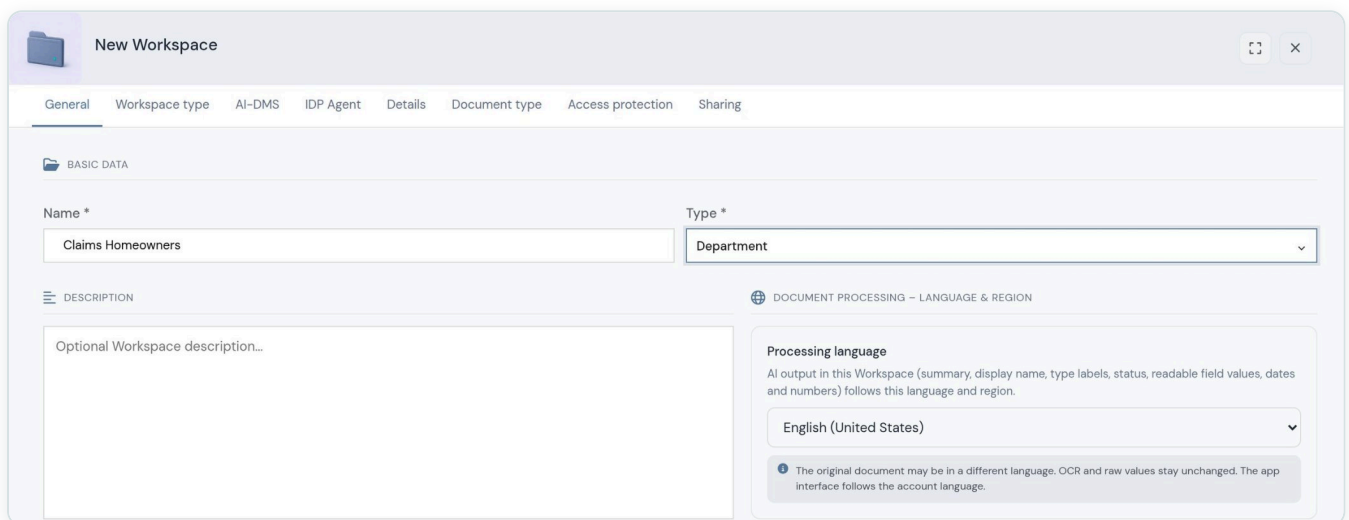
STATION	WHAT PAPEROFFICE DOES	WHAT YOUR CLAIMS DEPARTMENT DECIDES
Workspace	holds the documents of one line of business with rights and protection	how lines are split, group rights
Intake	collects emails with attachments, scans, and photos	which mailbox, which scanner, which devices
Read	type, sender, amounts, numbers, claim data	fields of the claim form agent, tier for handwriting
Link	links documents with the same number	the claim number on every letter
Review	findings, duplicate hints, missing fields	who reviews and who settles



04 · ONE WORKSPACE PER LINE OF BUSINESS

One line of business, one Workspace. With AI-DMS Premium.

Under **Document AI** > **Workspaces**, click **Create New Workspace**. On the **General** tab, enter a name and a type, for example “Claims Homeowners” with the type “Department”.



1 **Create.** Name “Claims Homeowners”, type “Department”. The processing language determines the language of the summary, type, and field values.

Workspace type Business

On the “Workspace type” tab, Business unlocks Details, Access protection, and the trash.

AI-DMS Premium

On the “AI-DMS” tab, choose Premium. This tier reads sender, amounts, and document and reference numbers.

Long expert reports

Under “Auto-processing limit”, set how many pages are read, to match your longest expert reports.

Claims with health data

On the “Access protection” tab, the Workspace asks for a password or an SMS code on opening. Under “User Groups”, you grant rights per group: “View + Download”, “View + Download + Upload”, or “Full access”.

A large claim in its own Workspace

For a large claim, create a Workspace with the type “File / Case” and enter the claim number under “Details” as “Reference No. / File Number”.

05 · TAKING IN DOCUMENTS

Four ways in. All into the line's Workspace.

A Connector collects the claims mailbox, mail comes in through the scanner, and field staff photos come from the smartphone. You upload single files and emails as .eml via [Add document](#) .

- 1 **Claims mailbox.** Under [Document AI](#) > [Storage Mounts](#) , click "Add Storage Mount", enter a name, choose "Use as import source" and the connection type "Email (IMAP)", then enter the mailbox server and login below. Then, under [Document AI](#) > [Connectors](#) , click "Create connector" and pick the mailbox and Target Workspace on the "Import source" tab. Every attachment becomes a document of its own.

Field staff via the Mobile App

Pair the smartphone once in the Security Center with "Add mobile device" and the QR code. In the app, pick the Workspace, take photos, and send. Without a network, in a basement for example, the scan waits on the device and uploads later.

Mail via scanner

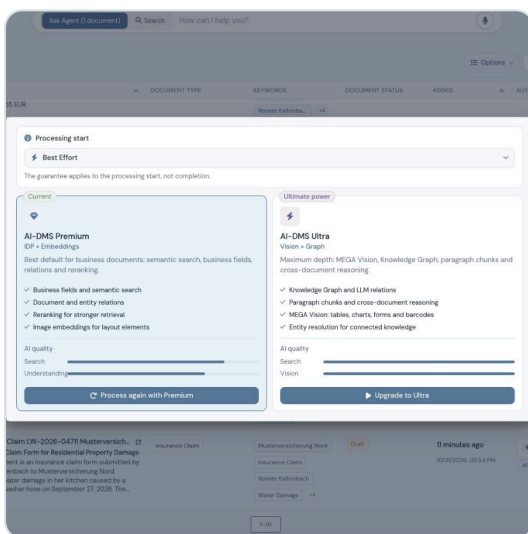
Set up a Scanner Endpoint (SFTP) once, with /inbox as the target folder on the device. New scans are ready on the "Scanner" tab of the upload dialog or arrive via Connector.

The Connector checks the mailbox on a schedule; the shortest interval is 5 minutes.

06 · READING, HANDWRITING INCLUDED

Every document gets a type. Ultra reads handwriting.

AI-DMS gives each document a type, a descriptive name, and a summary. In the test, the claim form got the type “Insurance Claim”, the estimate “Quote”, the expert report “Report”, the invoices “Invoice”, and the policy “Insurance Policy”.



Handwriting with Ultra

Select handwritten claim forms, choose **Actions** > **Agents & workflows** > **AI-DMS**, and click “Upgrade to Ultra”. AI-OCR then reads line by line with position, and the text becomes searchable.

Printed documents with Premium

Expert reports, estimates, and invoices run on the Workspace tier. Sender, amounts, and numbers then appear on the document.

A custom type for expert reports

Under **Document AI** > **Document Types**, use “New document type” to create, for example, “Loss assessment report”. In “Instruction for the AI”, describe its traits and how it differs, in English.

Which number was read

The “Data Fields” tab shows the detected Document Number and Reference Number. There you see whether AI-DMS captured the claim number.



07 · CLAIM DATA AS FIELDS

Claim number, policy, date. Every field with its source.

Select the claim form, then **Actions** > **Agents & workflows** > **IDP** > **Create new agent**. There, choose “Free template (Vision)” and add each field with “New field” and its own prompt.

The image shows a claim form for 'MUSTERVERSICHERUNG NORD' and its data fields in the PAPEROFFICE interface. The form is titled 'Schadenanzeige Wohngebäude' and contains sections for 'Versicherungsebene', 'Versicherungsvertrag', and 'Angaben zum Schaden'. The data fields in the interface are organized into a table with columns for 'with value', 'no value', and 'All'. The fields include 'Short summary', 'Loss date', 'Loss location', and 'Policy number'.

with value	no value	All
Required — HITL review	Short summary	
Damage notification for residential building (Schadenanzeige Wohngebäude) regarding water damage caused by a burst dishwasher hose.		
Required — HITL review	Loss date	
27.09.2026	27.09.2026	
Soft HITL review	Loss location	
Küche, Am Fördeblick 14, Kiel		
Required — HITL review	Policy number	
Not yet extracted		

1 The claim form agent. Six fields: claim number, policy number, loss date, loss location, course of events, policyholder. For the first three, “Behavior when value is missing” is set to “Required — HITL review”.

1 Test and save: “Start full test run” shows result, page, and source for each field. Also test a claim form that is hard to read, then click “Save and close”.

2 Apply automatically: under **Document AI** > **Document Types**, select the type “Insurance Claim” and choose “Bind IDP Agent” under “Actions”.

3 Read policies: under “Create new agent”, pick the “Insurance Policy” template in the catalog, with fields such as coverage amount and deductible.

The image shows the claim form and its data fields in the PAPEROFFICE interface, specifically the 'Data Fields' tab. The form is titled '2 Versicherungsvertrag' and contains sections for 'Versicherungsebene', 'Versicherungsvertrag', and 'Angaben zum Schaden'. The data fields in the interface are organized into a table with columns for 'with value', 'no value', and 'All'. The fields include 'Claim number', 'Course of events', 'Loss date', 'Loss location', 'Policy number', and 'Policyholder'.

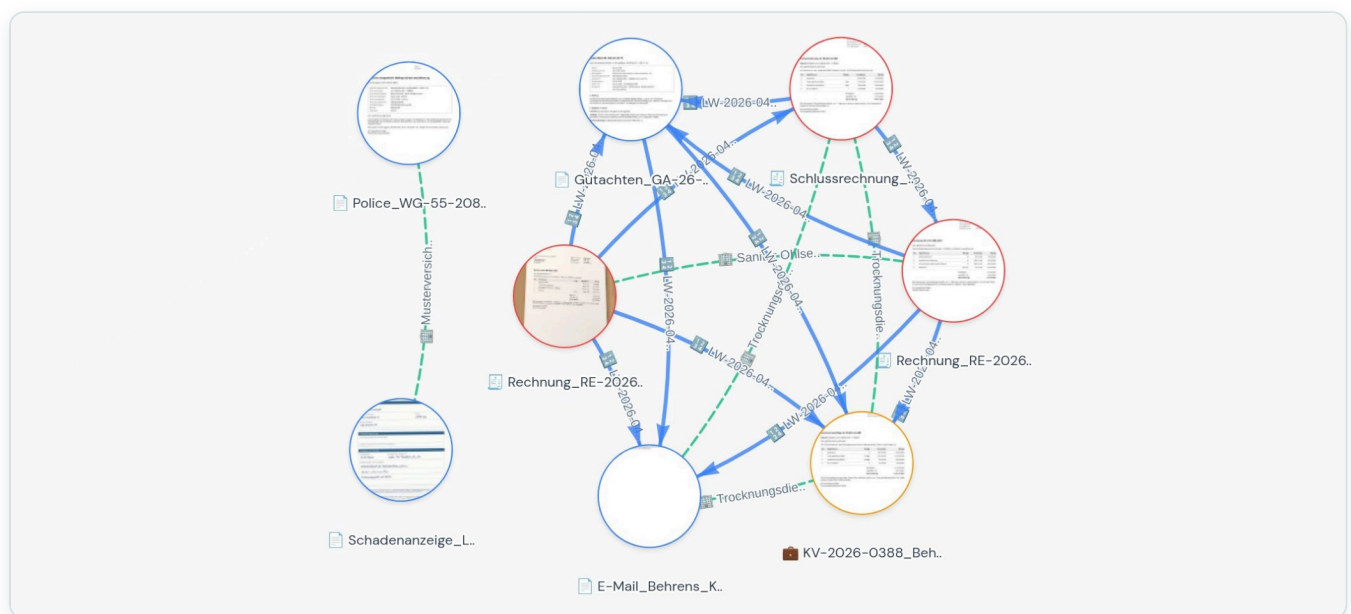
with value	no value	All
Claim number:	LW-2026-04711	
Course of events:	Zulaufschlauch der Spülmaschine geplatzt, We	
Loss date:	09/27/2026	
Loss location:	Küche, Am Fördeblick 14, Kiel	
Policy number:	VALUE_MISSING	HITL
Policyholder:		

2 The claim form from the test package. On the left the original, on the right the values of the claim form agent on the “Data Fields” tab, most with the snippet they were read from. The policy number shows VALUE_MISSING with a HITL badge because the customer left the field blank.

08 · LINKING BY CLAIM NUMBER

Same claim number. One thread in the view.

From Premium, AI-DMS reads the document, reference, and transaction number of every document. When AI-DMS reads the same number on report and invoice, written the same way and in the same field, for example as the reference number, the Knowledge Graph links them in the same Workspace.



- 1 The “Transactions” view. In the document list under “Options”, with the “Partner/Reference” filter switched on. Estimate, report, and both invoices hang together through LW-2026-04711. The claim form carries the number as its document number and, in the test, was linked only to the policy by partner. Add it with a folder (chapter 09).

What links

The numbers AI-DMS reads. The fields of your claim form agent serve export and review; linking runs through AI-DMS.

Spelling counts

To the graph, LW-2026-04711 and LW 2026 04711 are two numbers. Ask every sender to copy the number exactly.

Check for yourself

If an invoice carries several numbers, check on the “Data Fields” tab which one AI-DMS detected as the Reference Number.

TIP FROM PRACTICE

State the claim number in every acknowledgment, ideally in the subject line, and ask customer, contractors, and expert to copy it exactly into their letters. The more often it appears, the more PaperOffice links.

09 · PHOTOS AND DOCUMENTS WITHOUT A NUMBER

Photos carry no number. You add them to the claim.

Drag a photo onto the claim form in the document list. PaperOffice asks what to create: a link in the Knowledge Graph or a visible document folder.

Link documents

For business relationships without visible grouping.

Use this option for references, replacements, follow-up documents, the same case or supporting documents.

Relation type

Related to

Optional note

Short note about the link

Link only

Create document folder

For visible grouping in the document overview.

Use this option when several documents should be managed together as a case, file or working folder.

Folder name (optional)

Schadenanzeige_LW-2026-04711.pdf

The folder becomes visible in the list and can take in more documents later.

Create document folder

1 Two options after dragging. "Link documents" stores a business relationship, such as "Same process", with a note. "Create document folder" creates a visible folder in the overview.

A folder for the claim

Drag further photos, the repair estimate, and the expert report onto the folder. The claim's documents then sit visibly together.

A link without a folder

"Link only" records a business relationship, such as "Same process", with a note, without grouping the list.

PHOTOS FROM THE CLAIMS MAILBOX

When a customer emails photos to the claims mailbox, each photo becomes a document of its own in the Workspace. Then drag it onto the claim form like any other photo.

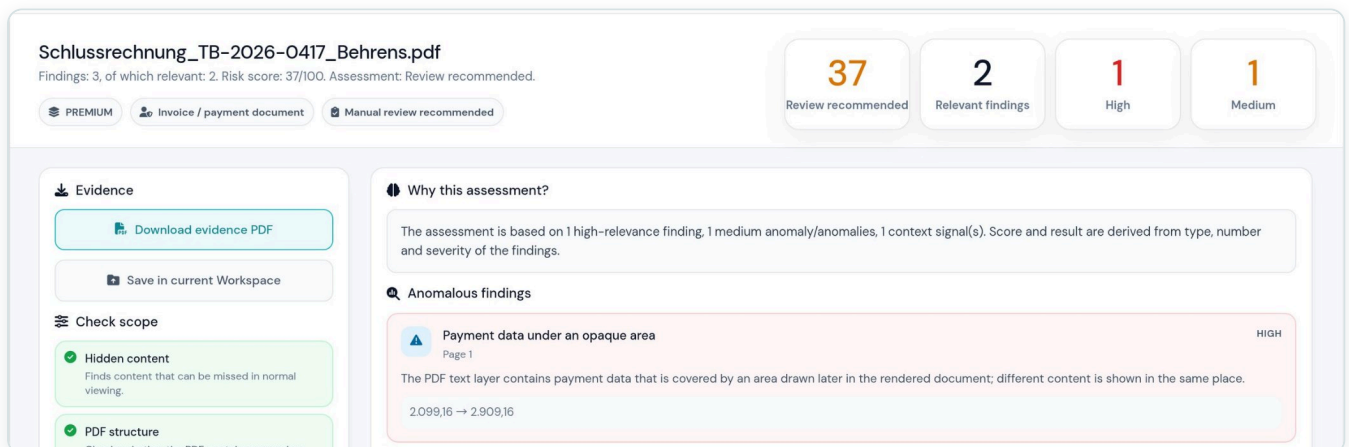


10 · CHECKING SUBMITTED PDFS

The PDF looks genuine. The Trust Agent looks underneath.

Under [Document AI](#) > [Trust Agent](#) > [Create Trust Agent](#), you set how documents are checked. Two agents suit claims work: one for invoices and estimates, one for policies and digitally created claim forms.

- 1 **Profile:** on the “Document type” tab. “Invoice / payment document” also checks totals and bank details, for example whether net plus VAT equals the gross amount. “Insurance policy / claim” checks whether typical terms, a policy or claim number, and a date label such as loss date or policy start appear in the text layer, which suits digitally created policies and claim forms.
- 2 **Check level Premium:** on the “Check level” tab, compares text layer and page image and adds the profile checks.
- 3 **“Highlight findings in the document”:** marks every relevant finding in a copy.
- 4 **Check:** select the PDFs, [Actions](#) > [Agents & workflows](#) > [Trust](#), then “Check with Trust Agent”.



- 2 **The result on the document.** “View certificate” opens the integrity check result: risk score from 0 to 100, assessment, and every finding with page and text excerpt. Shown: the final invoice from the test package with the covered final total, assessment “Review recommended”.

A FINDING IS A POINTER

The Trust Agent shows technical anomalies in PDFs. It does not prove forgery, and a PDF without findings is not thereby confirmed as genuine. Your reviewers decide on settlement against the original.

11 · SUBMITTED TWICE, INCOMPLETE

Submitted twice? Gaps? Both show on the document.

From Premium, PaperOffice checks whether the same document is already in the account: the same content, or the same document number from the same issuer, for the same document type.

- 1 The phone photo of invoice RE-2026-1093. Below the action bar, "Possible Duplicate" appears with reasons such as "Same Document Number" and "Same Amount", and the PDF that arrived earlier. The "Connections" tab lists all possible duplicates; "Not a duplicate" clears the hint.

On the later arrival

The hint appears on the document that came later. The same number with a different amount is flagged as well, since that is a case to review in itself.

Before approval

Whoever approves invoices for payment opens them and watches for the hint. That way a duplicate submission stands out before payment.

WHAT'S MISSING: THE "IDP REVIEW" VIEW

Under **Options** > **Configure view**, "IDP Review" shows the documents with missing or incomplete IDP fields, filtered by "Manual review required", "Value could not be recognized", and "Optional field not filled". If a queue is selected under "Review queue when required fields are missing" in the agent, a missing required field such as the policy number also creates a review task, included in the Professional plan.



12 · ASKING THE DOCUMENTS AND HANDOVER

Estimate, report, invoice. Ask the documents.

In the Workspace, click **Ask Agent** at the top, first “+ New” for an empty chat. The “Agent context” holds the Workspace; selected documents are added, for example as “Ask Agent (3 documents)”. The agent reads the documents itself and lets you open the ones it used.

The screenshot shows the PaperOffice AI interface. On the left, a sidebar lists four documents: 'Claims Homeowners TI', 'Schlussrechnung_TB-2026-0417_Behrens.pdf', 'Gutachten_GA-26-1172_Lindholm.pdf', and 'KV-2026-0388_Behrens.pdf'. The main chat area displays a question: 'Which line items differ between the repair estimate, the expert report, and the invoice?'. The answer states: 'The line items differ mainly in drying duration and scope: the estimate (KV-2026-0388, 28 Sep 2026) prices drying and equipment rental at 10 days (1,450.00 EUR + 380.00 EUR), while both the expert report (GA-26-1172, 12 Oct 2026) and the final invoice (TB-2026-0417, 14 Oct 2026) use 8 days per the measurement protocol (1,160.00 EUR + 304.00 EUR). The report additionally recommends two items the drying contractor never billed: plumber emergency work for the hose and angle valve (645.00 EUR, per the installer's invoice of 2 Oct 2026) and full laminate replacement in the kitchen, 14 m² (1,120.00 EUR), bringing its estimate to 3,469.00 EUR net. Leak detection (240.00 EUR) and travel (60.00 EUR) are identical in all three; travel is folded into the report's positions rather than listed separately. Two flags worth your attention: the invoice totals 2,909.16 EUR although its own net (1,764.00) plus VAT (335.16) equals 2,099.16 EUR, and the automated trust check rates the invoice "review_recommended" – I'd verify that total with Behrens before payment.' Below the answer are two buttons: 'Open: ID _56511pdf' and 'Open: ID _52999pdf'. At the bottom, it says '✓ Answered · 2 steps · 25.4 s Details'.

- 1 The question from the test case: “Which line items differ between the repair estimate, the expert report, and the invoice?” The agent names the shortened drying, 8 instead of 10 days, and the report's additional items. On the left, the agent context with the three selected documents; below the answer, buttons open the originals. You check every figure there.

PATH	HOW IT WORKS	IDEAL FOR
Share & export	Actions › Share & export on selected documents	single claims, follow-up questions
Export fields	Values of the claim form agent as JSON, CSV, or Excel	transfer into the claims system
REST API	Apply the agent via POST /documents/idp-agent-run; documents for a reference number via /knowledge_graph/business_case, included in the Plus plan	connecting the claims system
MCP	AI assistants ask with the rights of the connected key	research in the team

YOUR CLAIMS SYSTEM STAYS IN CHARGE

PaperOffice does not settle claims or pay out. Policies, reserves, and payments stay in your policy and claims system. PaperOffice delivers the documents, read and ready.

13 · WHAT CLAIMS DEPARTMENTS ASK AT THE START

Seven questions before your first claim.

**Does PaperOffice replace our claims system?**

No. Policies, reserves, and payments stay in your systems. PaperOffice reads the documents around them and delivers fields via export, REST API, or MCP.

Does PaperOffice link all documents of a claim?

The Knowledge Graph links documents on which AI-DMS reads the same number, written the same way and in the same field, in the same Workspace. You assign photos and documents without a number with a folder or a link.

Are handwritten claim forms read?

Yes, with AI-DMS Ultra. AI-OCR reads handwriting line by line with position, and the IDP Agent captures the fields with their source.

How does PaperOffice check submitted PDFs?

The Trust Agent checks for hidden and covered text, embedded files, and, from Premium, contradictions between text layer and page image. Your reviewers assess every result against the original.

What happens to invoices submitted twice?

From AI-DMS Premium, the later arrival of the same document type shows the hint "Possible Duplicate" with its reason. You decide before anything is settled twice.

Who can see the claim documents?

Groups with rights to the Workspace, equally in list, search, chat, and MCP. From Business, a password or SMS code protects opening.

What does it cost?

Billing is by usage, depending on the tier. The pricing page shows the details: paperoffice.ai/en/pricing.

14 · TRY IT YOURSELF IN 45 MINUTES

Download the test package. Walk through one claim.

Nine invented files for water damage claim LW-2026-04711 from a German property insurer, in German, show the whole path: from the handwritten claim form to checking the invoices.

INSURANCE TEST PACKAGE

Nine files and a guide (README.txt)

Schadenanzeige_LW-2026-04711.pdf handwritten, 2 pages, policy number blank
Foto_Kueche_1.jpg, Foto_Kueche_2.jpg field adjuster's photos
E-Mail_Behrens_Kostenvoranschlag.eml email with the estimate as a PDF
Gutachten_GA-26-1172_Lindholm.pdf expert report, 4 pages
Rechnung_RE-2026-1093_Ohlsen.pdf plumber, transposed digits in the total
Rechnung_RE-2026-1093_Foto_Kundin.jpg the same invoice as a phone photo
Schlussrechnung_TB-2026-0417_Behrens.pdf final total covered
Police_WG-55-208741.pdf homeowners building insurance policy
paperoffice.ai/downloads/paperoffice-ai-test-package-insurance.zip



- 1 **Workspace:** at app.paperoffice.ai, "Claims Homeowners (Test)", type "Department", AI-DMS Premium.
- 2 **Upload:** via "Add document", the invoice PDF before the phone photo. The photos work well via smartphone.
- 3 **Read:** process the claim form with Ultra, then create and apply the claim form agent (Chapters 06 and 07).
- 4 **Link:** open the "Transactions" view and put the photos into a folder with the claim form (Chapters 08 and 09).
- 5 **Check:** run both invoice PDFs through the Trust Agent "Invoice / payment document" and open the phone photo (Chapters 10 and 11).

FILE	WHAT TO LOOK FOR
Claim form	fields with source, policy number empty, entry in "IDP Review"
Estimate, report, invoices	linked through LW-2026-04711 in the "Transactions" view
Phone photo of the invoice	"Possible Duplicate", "Same Document Number" (both of type "Invoice")
Ohlsen invoice (PDF)	finding "Net plus VAT does not equal the gross amount"
Behrens final invoice	finding on the covered final total, with page and text excerpt
Policy	with the "Insurance Policy" template: coverage amount, deductible

All companies, names, addresses, numbers, bank details, and amounts in the test package are fictional. The pricing page shows what the test costs: paperoffice.ai/en/pricing.

15 · READ MORE: DATASHEETS AND SHORT GUIDE

Go deeper. A datasheet for every building block.

The datasheets describe features, click paths, and technical data of the building blocks in this guide. All available as PDF downloads.

SHORT GUIDE INSURANCE

The essentials on eight pages, to share with your team

Read claim forms, handwriting included, link documents by claim number, check submitted PDFs.

paperoffice.ai/downloads/paperoffice-ai-short-guide-branche-versicherung.pdf



CHAPTER 04

Workspaces

.../paperoffice-ai-datasheet-workspaces.pdf

CHAPTER 05

Connectors

.../paperoffice-ai-datasheet-connectors.pdf

CHAPTER 05

Mobile App

.../paperoffice-ai-datasheet-mobile-app.pdf

CHAPTER 06

AI-OCR

.../paperoffice-ai-datasheet-ocr.pdf

CHAPTER 06

Classification

.../paperoffice-ai-datasheet-classification.pdf

CHAPTER 07

IDP Agent

.../paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf

CHAPTERS 08 AND 09

Knowledge Graph

.../paperoffice-ai-datasheet-knowledge-graph.pdf

CHAPTER 10

Trust Agent

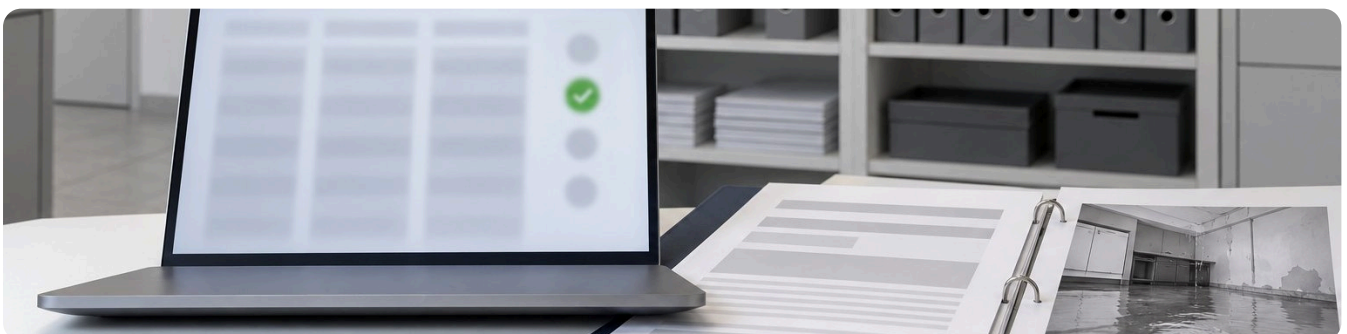
.../paperoffice-ai-datasheet-document-integrity-check.pdf

CHAPTER 12

Document Chat

.../paperoffice-ai-datasheet-document-chat.pdf

All datasheets are at paperoffice.ai/downloads/. The file name appears below each name.



16 · YOUR FIRST CLAIM IN FIVE DAYS

Start with one line of business. Then add the next.

To get started, one line of business, one mailbox, and the documents of a few closed claims are enough.

1

Day 1 · Workspace

Create the line's Workspace: type "Department", Business, AI-DMS Premium, a page limit for expert reports, group rights, and access protection.

2

Day 2 · Intake

Connect the claims mailbox as a Storage Mount and Connector, set up the Scanner Endpoint, and pair the field staff's smartphones.

3

Day 3 · Claim form agent

Agree on the fields with claims staff, test the agent on claim forms that are easy and hard to read, and bind it to the "Insurance Claim" type.

4

Day 4 · Link and check

Upload a closed claim, check in "Transactions" what is linked, and create the two Trust Agents.

5

Day 5 · Review routine

Decide who checks "IDP Review" daily, who assesses Trust findings and duplicate hints, and how fields reach the claims system.

MEASURE THESE FOUR VALUES

Documents

Documents per claim that arrive in the Workspace

Linked

Share of documents attached to the claim in "Transactions"

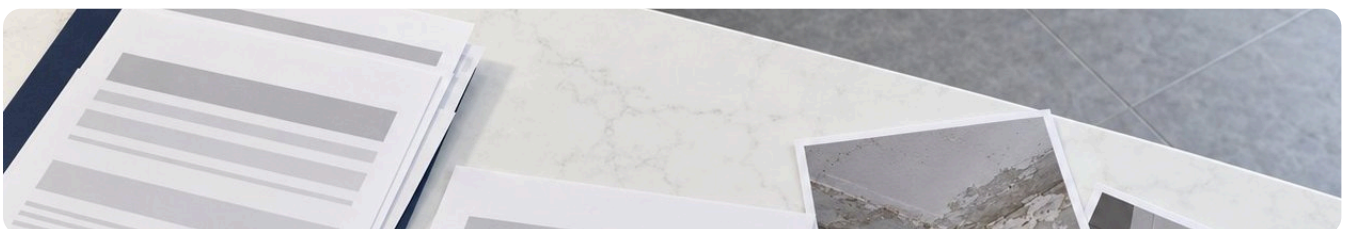
Zero rework

Share of claim forms that don't appear in "IDP Review"

Time to full file

Time from first notice until all documents are together and read

Measure the first claims precisely. Only the comparison with the following weeks shows how much searching goes away.



17 · CHECKLIST AND START

Before you expand.

- ☐ Each line of business has its own Workspace with suitable group rights, and large claims can have their own.
- ☐ The Workspaces run on AI-DMS Premium; handwritten claim forms run on Ultra.
- ☐ Claims mailbox, scanner, and smartphones deliver into the line's Workspace.
- ☐ The claim form agent is tested and bound to the "Insurance Claim" type.
- ☐ Acknowledgments state the claim number and ask senders to copy it exactly.
- ☐ Two Trust Agents are set up: invoices and estimates, policies and claim forms.
- ☐ Whoever approves invoices watches for "Possible Duplicate" and checks every figure of a chat answer against the original.
- ☐ A run with the test package is complete.

GET STARTED NOW

Create an account, set up the line's Workspace, and upload the test package. Billing is by usage; the pricing page lists the tiers.

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**QUESTIONS ABOUT THIS GUIDE?**

Contact us if you have questions about the setup or your lines of business.

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As of October 2026. Screenshots are from a test account. All examples, companies, names, claim and policy numbers, bank details, and values in this guide are fictional. PaperOffice, paperoffice.ai.