



SHORT GUIDE • INDUSTRY • HEALTHCARE

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

Referral letters, medical reports, lab results, insurer forms and consent forms arrive mixed, often as a single scan. This short guide shows how PaperOffice splits them, recognizes them, reads the details and shares them securely. For hospitals, outpatient centers, practices and labs.

WHAT IT IS ABOUT

An admissions stack becomes individual documents, each with a type and fields such as patient name and insurer, stored in protected Workspaces and redacted before a copy leaves the building.

01 · THE PROBLEM

One patient, ten sheets. Each from somewhere else.

At admissions, every patient brings a referral, prior findings, a medication plan and insurer forms. Medical reports also arrive by mail and email. Everything is scanned, often into a single PDF, and then has to be split, named and retyped by hand before the ward can work with it.

WHY IT HAPPENS

One scan, many documents

Admissions scans everything a patient brings in one pass. Where the referral ends and the prior findings begin only becomes clear to whoever goes through the PDF page by page.

Every practice writes differently

Referring practices, labs and hospitals use their own forms and letterheads. Name, date of birth and insurer sit in a different place each time, sometimes added by hand.

Sharing calls for care

Assessors, insurers and studies need documents, often without names and addresses. Covering them by hand and rescanning takes time, and one spot is easily missed.

HOW YOU NOTICE IT

- A combined scan from admissions is split into separate files by hand every day.
- Name, date of birth and insurer are retyped from the referral into the system.
- A patient's prior findings are searched for in the inbox, the scan folder and the files.
- Handwritten notes on referrals lead to calls back to the practice.
- Copies for assessors are blacked out with a marker and scanned again.

02 · THE WAY WITH PAPEROFFICE

Split, read, store securely.

Your hospital or practice information system remains the system for treatment and billing. PaperOffice handles the papers before that: split, recognize, read the details and store them securely. Medical assessment stays with your staff.

1

Split the stack

The Split Agent detects where a document ends in a combined scan, removes blank pages and names each part by type, date and sender. Announced enclosures stay with the main document.

[MODULE: SPLIT AGENT](#)

2

Recognize the document type

AI-DMS recognizes types such as referral, medical report, lab result, prescription, discharge summary and sick note. You describe your own types, such as consent, in a few sentences.

[MODULE: CLASSIFICATION](#)

3

Admission data as fields

An IDP Agent reads the fields you describe in your own words, such as patient name, date of birth, insurer and referring practice, each value with its source location in the original.

[MODULE: IDP AGENT](#)

4

Store separately and securely

Admissions, wards and billing work in Workspaces of their own with group rights. From Business, a Workspace can ask for a password or SMS code on opening; Compliance adds a watermark.

[MODULE: WORKSPACES](#)

5

Share redacted

The **Medical Records** scenario redacts personal and medical details in a copy, with a preview. The copy goes out by link, with the password sent by SMS if you wish.

[MODULE: SECURE EMAIL DELIVERY](#)

03 · IN THE APP

From the admissions stack to a read document.

This is how admissions and the office set up the process. You need a Workspace with AI-DMS Premium, a Split Agent and a few typical admissions stacks for testing.

1

Create the Workspace

Under **Document AI › Workspaces**, create a Workspace for admissions, choose Business or Compliance as its type and set AI-DMS Premium for new documents.

2

Split the stack

Create a Split Agent with the admissions Workspace as its target. Select the combined scan, open **Actions › Agents & workflows › Split** and choose **Run via Split Agent**. The original stack is kept.

3

Set the fields

Select a referral and create an agent under **Actions › Agents & workflows › IDP**. Make name, date of birth and insurer required fields; **IDP Review** collects documents with gaps.

4

Bundle the documents

Drag the prior findings onto the referral and choose **Create document folder**. A patient's documents then sit visibly together.

5

Redact and send a copy

Redact with a preview under **Actions › Agents & workflows › Redact**, scenario **Medical Records**. Send the copy with **Actions › Share & export › Send by email**, with the password by SMS if you wish.

TIP FROM PRACTICE

Required fields instead of silent gaps Make name, date of birth and insurer required fields and choose a review queue. If a value is missing, a review task is created for admissions. Review tasks are included in the Professional plan.

04 · AN EXAMPLE

A specialist clinic brings order to admissions.



An orthopedic clinic with 120 beds admits scheduled patients every day. They bring a referral, prior findings, X-ray reports and health insurer forms. An admissions clerk scans everything, splits the files and transfers the details into the hospital system.

BEFORE

- He scans each patient's documents as one PDF and splits it by hand afterwards.
- He retypes name, date of birth and insurer from the referral.
- Prior findings that arrive by mail are later searched for in the scan folder by the ward.
- He covers copies for the assessor with a marker and scans them again.

WITH PAPEROFFICE

- The Split Agent splits the combined scan; each part carries type, date and sender in its name.
- The IDP Agent reads name, date of birth and insurer; gaps appear in IDP Review .
- A patient's referral and prior findings sit together in one document folder.
- For the assessor, a redacted copy goes out by link with a password.

An invented hospital case for illustration. Check on your own stacks whether splitting and fields are right, and agree on the handling of patient data with your data protection officer.

05 · CHECKLIST

Are your admissions ready for separated documents?

Go through these points with admissions, wards, IT and data protection. Most can be tried out on a set of sample stacks made from your own forms.

- | | |
|---|---|
| ☐ Admissions, wards and billing each have a Workspace of their own with suitable group rights. | ☐ Workspaces with patient documents are Business or Compliance and ask for a password or SMS code. |
| ☐ New documents run on AI-DMS Premium, handwritten notes on Ultra. | ☐ The Split Agent has been tested on five sample stacks from admissions. |
| ☐ Your own document types, such as consent, are set up with a short instruction. | ☐ The fields for referrals are agreed: name, date of birth, insurer, referring practice. |
| ☐ Name, date of birth and insurer are required fields with a review queue. | ☐ Whoever reads medical reports checks every value taken over at its source in the original. |
| ☐ It is set which redaction scenario applies for assessors and for studies. | ☐ Your data protection officer has reviewed the process, rights and sharing. |

06 · FREQUENTLY ASKED QUESTIONS

What admissions, IT and data protection ask first.

Does PaperOffice assess or code diagnoses?

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

Are handwritten notes read?

Yes. At the Ultra tier, AI-OCR also recognizes handwriting, line by line with position and confidence. Check hard-to-read spots in the original before a value goes into the hospital system.

Can we anonymize documents for a study?

Scientific Research also redacts diagnoses. To keep them legible, choose **Custom** without health data and check every spot in the preview. The original remains unchanged. Whether the copy is sufficient is for your study lead to assess.

Do we need a template for every practice?

An IDP Agent reads your fields by content, by labels and context, instead of fixed positions. Test it with referrals from several practices and compare whether the values stay stable.

How do the details get into our hospital system?

As an export of the data fields in JSON, CSV or Excel. Via REST API, you start an agent with `POST /documents/idp-agent-run` and fetch the fields; AI assistants use the MCP tool `po_documents_idp_agent_run`.

Who sees which documents?

You assign rights per Workspace and group: view and download, plus upload, or full access. The server checks them on every call, from the app, via REST API and over MCP.

07 · HOW TO START

Split your next admissions stack.

Create an account at app.paperoffice.ai, set up a Workspace for admissions and split a sample stack of your forms with the Split Agent. You pay for what you process; the pricing page lists the tiers.

Start with samples

Fill in your most common forms with invented details and scan them as one stack. This lets you test splitting and fields without real patient data.

Agree on fields with admissions

Decide with admissions and the wards which details every referral should deliver and who handles open review tasks.

Involve data protection

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

DATASHEETS ON THIS TOPIC

Split Agentpaperoffice.ai/downloads/paperoffice-ai-datasheet-pdf-split.pdf**Classification**paperoffice.ai/downloads/paperoffice-ai-datasheet-classification.pdf**IDP Agent**paperoffice.ai/downloads/paperoffice-ai-datasheet-idp-intelligent-document-processing.pdf**AI-OCR**paperoffice.ai/downloads/paperoffice-ai-datasheet-ocr.pdf**Workspaces**paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf**Secure email delivery**paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-safe-email-delivery.pdf

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