



SHORT GUIDE • INDUSTRY • PUBLIC ADMINISTRATION

Applications, evidence, objections: all one stack?

Now every application reaches your desk already read.

Applications, evidence, powers of attorney and objections arrive at the counter, by mail and by email, often as one mail stack. This short guide shows how PaperOffice splits and recognizes them, reads application data and links them by file number. For municipalities, counties and agencies.

WHAT IT IS ABOUT

A mail stack becomes individual documents, application data arrives as fields with their source, missing required details go to review, and items with the file number spelled the same way sit side by side.

01 · THE PROBLEM

The application comes on paper. The evidence comes later.

Every day, the citizen service office and the mailroom receive applications, evidence, powers of attorney and objections, at the counter, by mail and by email. Much is filled in by hand, and enclosures follow separately. Before an application can be processed, it is sorted, retyped and checked for completeness.

WHY IT HAPPENS

One stack, many cases

The mailroom scans the day's mail in one pass. Where one application ends and the next registration certificate begins only becomes clear to whoever goes through the PDF page by page.

Forms filled in by hand

Applicants fill in forms with a ballpoint pen, tick boxes and add notes in the margin. Name, address and file number get retyped, and a transposed digit shows up only in the decision.

Evidence arrives later

Proof of income, powers of attorney or an objection arrive weeks after the application. They belong to the same case and still end up in a different stack.

HOW YOU NOTICE IT

- The day's mail is split by hand into separate applications and evidence every morning.
- Name, address and file number are retyped from the form into the case management system.
- Whether an application is completely filled in only shows when someone pages through it.
- A late piece of evidence is searched for in the in-tray, the inbox and the scan folder.
- Copies for file inspection are blacked out with a marker and scanned again.

02 · THE WAY WITH PAPEROFFICE

Split, read, link by file number.

Your case management system remains the system for processing and decisions. PaperOffice handles the intake before that: split, recognize, read application data, link and release redacted copies. The decision on an application is always made by the responsible person.

1

Split the mail stack

The Split Agent detects where a document ends in a combined scan, removes blank pages and names each part. An announced enclosure stays with its main document.

MODULE: [SPLIT AGENT](#)

2

Recognize what comes in

AI-DMS recognizes types such as government form, registration, payslip, power of attorney and building permit. You add your own types, such as objection, with a short instruction.

MODULE: [CLASSIFICATION](#)

3

Application data as fields

The [Government Forms](#) template reads form number, applicant, case number, submission date, checkbox selections and supporting documents. Forms filled in by hand run on Ultra.

MODULE: [IDP AGENT](#)

4

Link by file number

From AI-DMS Premium, PaperOffice reads document, reference and transaction numbers. If application and evidence in a Workspace show a file number spelled the same way, the graph links them.

MODULE: [KNOWLEDGE GRAPH](#)

5

Release redacted

For a disclosure request, the [GDPR Request \(Art. 15\)](#) scenario redacts third-party data in a copy, with a preview. The copy goes out by link with a password, and every access is logged.

MODULE: [SECURE EMAIL DELIVERY](#)

03 · IN THE APP

From the mail stack to a case that has been read.

This is how the mailroom and a department set up the process. You need a Workspace per department with AI-DMS Premium, a Split Agent and a few typical applications for testing.

1

A Workspace per department

Under **Document AI › Workspaces**, create a Workspace per department, choose Business or Compliance as its type, set AI-DMS Premium and assign the group rights.

2

Split the mail stack

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

3

Read application fields

Select an application and create an agent from the **Government Forms** template under **Actions › Agents & workflows › IDP**. Keep applicant and case number required and set all other fields to **Ignore in KPI**.

4

View the case

In the document list, choose the **Transactions** view under **Options**. Items linked by the Knowledge Graph hang together; a double-click opens each document.

5

Redact for file inspection

Redact with a preview under **Actions › Agents & workflows › Redact**, scenario **GDPR Request (Art. 15)**. Check every spot, then release the copy by secure delivery with a password.

TIP FROM PRACTICE

Put the file number on every letter State the file number in acknowledgments of receipt and in requests for documents, and ask applicants to quote it unchanged with their evidence. The Knowledge Graph then links late documents to the application during processing.

04 · AN EXAMPLE

A citizen service office sorts the day's mail.



A town administration with 140 employees accepts applications at the counter and by mail in its citizen service office, for example for housing benefit and residents' parking permits. An experienced clerk sorts the mail stack every morning, matches evidence to file numbers and checks every application for completeness.

BEFORE

- He splits the scanned daily mail by hand into separate applications and evidence.
- He retypes applicant and file number from the form into the case management system.
- He only sees that a required detail is missing when he pages through.
- He blacks out copies for file inspection with a marker and scans them again.

WITH PAPEROFFICE

- The Split Agent splits the daily mail, and enclosures stay with their application.
- The **Government Forms** template reads applicant and file number, with the source in the form.
- If a required detail is missing, a review task is created, and **IDP Review** shows the application.
- Evidence with the file number spelled the same way hangs on the application in the **Transactions** view.

An invented example for illustration. Check on your own forms whether splitting and fields are right, and clarify legal bases and data protection with the responsible units of your organization.

05 · CHECKLIST

Is your department ready for an intake that is read?

Go through these points with the mailroom, the department, IT and data protection. Most can be tried out on a set of sample forms.

- ☐ It is decided whether you create one Workspace per department, per procedure or per office.
- ☐ Workspaces with sensitive cases are Business or Compliance and ask for a password or SMS code.
- ☐ The Split Agent has been tested on sample stacks from the mailroom.
- ☐ The required fields per application type are set, and a review queue is chosen.
- ☐ Whoever decides checks every value taken over at its source location in the form.
- ☐ For each Workspace it is set which groups may read, upload or do everything.
- ☐ New documents run on AI-DMS Premium, handwritten forms on Ultra.
- ☐ Your own types, such as objection, are set up with a short instruction for the AI.
- ☐ Acknowledgments of receipt and requests for documents state the file number.
- ☐ It is set which redaction scenario applies for file inspection and disclosure requests.

06 · FREQUENTLY ASKED QUESTIONS

What departments, IT and data protection ask first.

Does the AI decide on an application?

The decision is made by the responsible person. PaperOffice splits, recognizes and reads the intake and puts missing required details up for review. For every value read, the data field shows its source location in the form.

Are forms filled in by hand read?

Yes. With AI-DMS Ultra, AI-OCR also recognizes handwriting, line by line with position and confidence. The

Government Forms template reads checkbox selections as a field of their own. Check hard-to-read spots in the original.

How do departments stay separate?

Through Workspaces of their own with rights per group: view and download, plus upload, or full access. The server checks these rights on every call, from the app, via REST API and over MCP.

How do we spot an incompletely filled-in application?

Every field starts as required. Keep that for applicant or case number and set the rest to **Ignore in KPI**. If a value is missing and a review queue is chosen, a review task is created, and **IDP Review** shows the gaps. Included in the Professional plan.

How does the data get into our case management system?

As an export of the data fields in XLSX, CSV or JSON. 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`.

How do we redact for publication?

Under **Actions › Agents & workflows › Redact** you choose the scenario for the purpose; for website and press, the maximum anonymization. You check every spot in the preview, the text underneath is removed from the copy, and the original remains unchanged.

07 · HOW TO START

Split your next batch of daily mail.

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

Start with sample forms

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

Set the required fields

Decide for each application type which details are required and who handles open review tasks.

Involve data protection

Show your data protection office Workspace rights, access protection and redaction scenarios before real applications 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**Knowledge Graph**paperoffice.ai/downloads/paperoffice-ai-datasheet-knowledge-graph.pdf**Secure email delivery**paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-safe-email-delivery.pdf**Workspaces**paperoffice.ai/downloads/paperoffice-ai-datasheet-workspaces.pdf

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