



SHORT GUIDE · DOCUMENT TYPE · MEDICAL RECORDS

Typing lab values off a printout? The values arrive as a table.

Lab results, medical reports, prescriptions and referrals arrive by mail, as scans or as PDFs. PaperOffice recognizes the document type, reads values as a table and redacts copies for third parties. For practices, labs, clinics and billing offices.

WHAT YOU TAKE AWAY

Document types from lab result to discharge summary, fields and value tables described in your own words, handwriting with AI-OCR Ultra and redacted copies with the **Medical Records** scenario.

01 · THE PROBLEM

The report has arrived. The values are on paper.

Results and reports arrive by mail, as scans or as PDFs from the lab. Someone types the patient header and values into the practice software, files the paper and copies it for assessments or billing. Often the complete file travels further than the occasion requires.

WHY IT HAPPENS

Every lab has its own layout

Values, units and reference ranges sit in a different place for every sender. Whoever types them searches each report again, and a digit is quickly swapped.

Handwriting on forms

Additions on forms and notes are written by hand. They have to be read and transferred before they show up in search or in the software.

Copies for third parties show too much

Assessments, studies or billing often need only part of the records. Redaction happens by hand, and a name or date of birth easily stays visible.

HOW YOU NOTICE IT

- Lab values are transferred into the practice software by hand and checked again later.
- A report exists twice, once on paper and once as a scan without text.
- For a request, the whole file is copied instead of the pages needed.
- Copies for assessors are blacked out with a marker.
- Results, prescriptions and billing documents sit in one shared folder.

02 · THE WAY WITH PAPEROFFICE

From the inbox to reviewed fields.

PaperOffice reads every incoming document, assigns it a document type and fills the fields you define. The medical assessment stays with your staff.

1

Capture incoming documents

Scans, PDFs and photos reach a workspace by upload, Mobile App or network scanner. AI-OCR reads scans too, and in the Ultra tier also handwriting.

[MODULE: AI-OCR](#)

2

Recognize the document type

Classification distinguishes types such as lab result, medical report, prescription, referral and discharge summary. You describe your own types in words.

[MODULE: CLASSIFICATION](#)

3

Read values as a table

An IDP Agent reads the fields you describe, such as patient ID and examination date, plus the values as a table with test, result, unit and reference range.

[MODULE: IDP AGENT](#)

4

Have gaps reviewed

If a required field is missing, a review task is created for your staff. Every value comes with page and source location, and the **IDP Review** view collects open cases.

[MODULE: IDP AGENT](#)

5

Store and share securely

Workspaces separate practice, lab and billing with their own group permissions. You redact copies for third parties with the **Medical Records** scenario and send them as a password-protected link.

[MODULE: WORKSPACES](#)

03 · IN THE APP

Describe once, read every report.

This is how you set up capture. The agent reads by content rather than fixed positions, so you use the same agent for reports from different labs.

1

Check the types

Under **Document AI** > **Document Types** you see the medical types. On the lab result type you later set your agent as **Default IDP Agent**, so it runs after recognition.

2

Create the agent

Select a report, then **Actions** > **Agents & workflows** > **IDP** and **Create new agent**. Describe the fields in your own words and the lab values as a field of type table.

3

Test

Start full test run shows result, confidence, page and source location for each field. Repeat the test with reports from other labs.

4

Use the data

Read the values in the **Data Fields** tab and export them as JSON, CSV or Excel. The **IDP Review** view collects documents with open required fields.

5

Copy for third parties

Via **Actions** > **Agents & workflows** > **Redact**, choose the **Medical Records** scenario and check every finding in the preview. Then send the copy via secure delivery with a password.

TIP FROM PRACTICE

Add a column for the flag In the value table, also describe a column for the flag printed in the report, such as H or L. That way you see notable values at a glance, and the assessment stays with the lab and with you.

04 · AN EXAMPLE

Lab results in a family practice.



A family practice with three physicians receives lab results every day as PDFs and on paper. A medical assistant types the values into the practice software. For assessments, files are copied and redacted by hand.

BEFORE

- Lab results are printed, read and typed in value by value.
- Paper results are scanned and filed as images without text.
- For an assessment, the file is copied and blacked out with a marker.
- Results, prescriptions and billing sit in the same folder.

WITH PAPEROFFICE

- Results flow into a workspace, and classification recognizes the type.
- An IDP Agent reads header and values as a table; the export goes to the practice software.
- If the examination date is missing, a review task is created.
- Copies for assessors are made with a preview and go out as a password-protected link.

A fictional example for illustration. The connection to your practice software, the legal basis for sharing and your retention periods are for you to check.

05 · CHECKLIST

Ten points for your medical records.

Go through the points for your practice or clinic. Each one can be answered with yes or no and shows where to improve.

- | | |
|--|--|
| ☐ We know through which channels results and reports reach us. | ☐ Paper results are captured with text recognition and are searchable. |
| ☐ Our document types separate lab result, medical report, prescription and referral. | ☐ The agent's fields are described in our own words and tested on real reports. |
| ☐ Lab values arrive as a table with unit and reference range. | ☐ Required fields such as patient ID and examination date trigger a review when missing. |
| ☐ The medical assessment lies with our staff. | ☐ Practice, lab and billing have their own workspaces and group permissions. |
| ☐ Copies for third parties are redacted with a preview; the original stays unchanged. | ☐ Confidential records go out as a password-protected link instead of an open attachment. |

06 · FREQUENTLY ASKED QUESTIONS

What you should know before you start.

Do I need a template for each lab?

An IDP Agent reads your fields by content, meaning labels and context in the report. Test it with reports from several labs and compare whether the values stay stable.

Does PaperOffice assess the values medically?

PaperOffice reads what is in the document: values, units, reference ranges and flags, if you describe them as fields. The medical assessment stays with your staff.

How do you protect patient data in the workspace?

Workspaces have their own group permissions and, from Business on, access protection by password or SMS code. If you choose Compliance in the **Workspace type** tab, previews and PDF downloads carry a watermark with user and time.

Are handwritten entries read?

In the Ultra tier, AI-OCR also recognizes handwriting and returns it with position and confidence per line. Check hard-to-read passages against the original.

How does the data get into our practice software?

As an export in the **Data Fields** tab: JSON, CSV or Excel. Via REST API you start an agent with POST /documents/idp-agent-run and fetch the fields; via MCP, use po_documents_idp_agent_run.

Can we share records in anonymized form?

Yes. With the **Medical Records** scenario, the Redact Agent redacts personal and medical details, with a preview before applying. The copy is a separate document; the original stays unchanged.

07 · HOW TO START

Read your first report as a table

Create an account at app.paperoffice.ai, set up a workspace for results, upload a lab result and build your first agent via [Actions › Agents & workflows › IDP](#). Billing is based on usage; details are on the pricing page.

Separate workspaces

Create separate workspaces for practice, lab and billing and assign group permissions per workspace.

Test on real reports

Test the agent with reports from several senders before it runs automatically in the workspace.

Set rules for sharing

Decide who creates copies for third parties, and save a Redact Agent with a fixed scenario for it.

DATASHEETS ON THIS TOPIC

AI-OCR

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

Classification

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

IDP Agent

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

Workspaces

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

Secure email delivery

paperoffice.ai/downloads/paperoffice-ai-datasheet-audit-safe-email-delivery.pdf

MORE ON THIS TOPIC

Medical records

paperoffice.ai/en/solutions/document/ai-medical-records-ocr-processing



MORE ON THIS TOPIC

paperoffice.ai/en/solutions/document/ai-medical-records-ocr-processing

PRICING

paperoffice.ai/en/pricing

CONTACT

paperoffice.ai/en/contact