



INBOUND DOCUMENT INTELLIGENCE (IDI)

AN AGENT FOR ACTION

Manages Every Document. Prevents Care Gaps. Extracts Data for Quality Reporting.

Volumes of inbound documents. Multiple sources and formats. Each needing to be sorted, classified, patient-matched, and correctly filed.

But the workflow doesn't stop there. Action needs to be taken. For example, next steps (like screenings, lab tests, referral appointments) must be ordered and completed – and results extracted so data for quality reporting can be compiled. When done well, continuity of care is assured and incentive payments are optimized.

Verisma Inbound Document Intelligence (IDI) removes the friction and bottlenecks inherent to these processes – addressing challenges like delayed care, incomplete patient information, lost revenue, noncompliance with regulatory standards, and staff burnout.

AI Automation, With Human-In-The-Loop Oversight

The process of managing inbound documents has typically been governed by well-defined organizational rules, protocols, and standard operating procedures (SOP) – which makes the task an ideal fit for AI and automation.

Verisma's secure, HIPAA-compliant technology enables organizations to centralize and standardize document workflows across facilities, departments, and EHRs.

- ▶ Information is filed in the right place in near-real time.
- ▶ Results and outcomes can be derived from the clinical documentation – producing data for quality reports.
- ▶ The AI agent supports the creation of underlying orders for next steps, such as preventive screenings, referral orders, and lab tests.
- ▶ Any exceptions that deviate from the client's SOP are redirected to Verisma's experts for review and action.

Two Packages To Meet Every Provider's Need

Recognizing that every organization has unique needs, Verisma offers two ways to leverage Inbound Document Intelligence. Essentials automates document management for efficiency and accuracy; Select adds quantifiable value by prompting actions to help prevent or close gaps in care.

IDI ESSENTIALS

A standardized, secure option that serves as the document-handling backbone for any provider, regardless of electronic health record or document type.

IDI SELECT

Advanced workflows create orders and extract screening and data from clinical documentation – contributing significantly to quality scores and incentive payments.

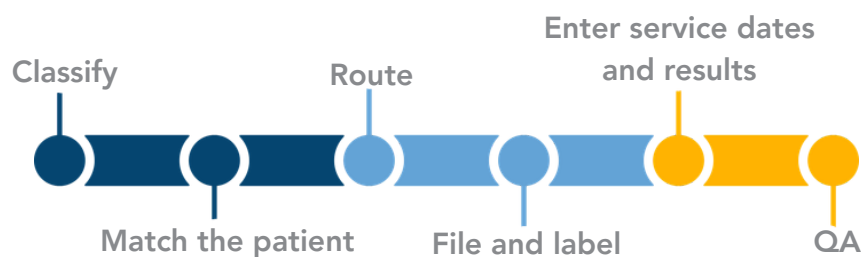
How Verisma IDI Works

Verisma IDI can be implemented across any EHR, with no demands on the organization's IT infrastructure. It operates within familiar EHR and document management screens, for easy access and use.

The solution delivers dual audit trails: the user's EHR audit plus Verisma processing logs with confidence scores, classification results, and filing actions.

Plus, privacy is protected since no patient data is used to train the AI agent. PHI is not stored, copied, or transmitted to Verisma systems.

**EVERY
DOCUMENT
FOLLOWS THE
SAME PATH**



WHO BENEFITS?

▶ Health Information & Document Management

Teams that spend significant time manually sorting and filing inbound documents.

▶ IT and Compliance Teams

That need a fully auditable, HIPAA-compliant automation solution with no backend integration required.

▶ Clinical Operations Leaders

Dealing with gaps in care, patient noncompliance, backlogs, filing delays, or staffing constraints in document management.

▶ Executive Leadership

Seeking strategies to lower the cost of labor-intensive tasks, optimize quality and value-based incentive payments, scale processes through AI and automation.

Let's manage inbound documents more efficiently, eliminate your backlog, and scale capacity without adding headcount.

Learn more at verisma.com

