Smart Documents Powered by Ask Integrity AI

Quick Reference Guide

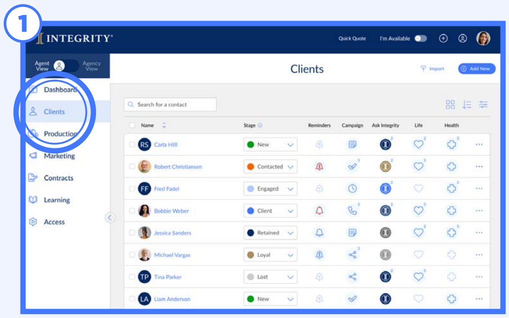
Ask Integrity AI-Powered Smart Documents turns every document into instant, usable data. Simply upload any client document, and Ask Integrity AI automatically captures key details, converts them into data, and links everything right to the client profile — giving you a review option before it’s saved. The result is a faster, more connected workflow.

**You upload. Ask Integrity AI delivers.
Paperwork to policy without missing a beat.**

How to use AI-Powered Smart Documents

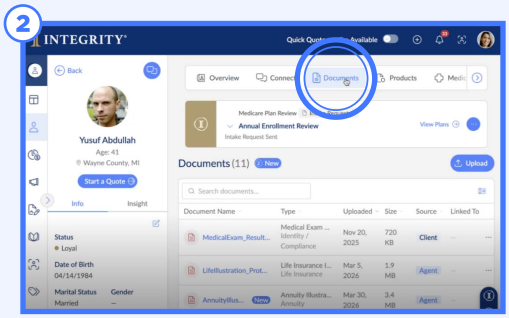
1 Open a client record

Smart Document is client-specific. Click on the client whose document you want to upload.



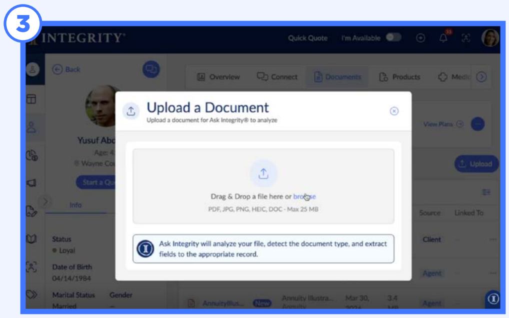
2 Go to the documents tab

Inside the client record, click the **Documents** tab. This is where all uploaded documents for that client are stored.



3 Upload a document

Click **Upload**, then drag and drop your file.



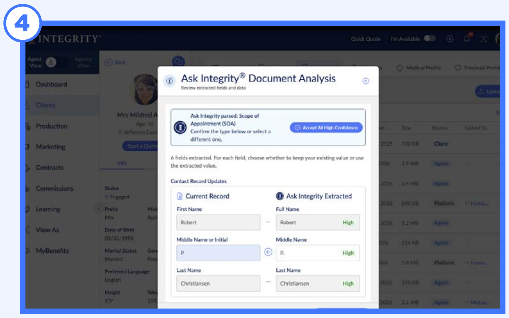
4 Review AI-extracted data

If your document is an Ask Integrity AI-supported type, the system will:

- Identify the document type automatically
- Extract key data fields and display the results
- Show a confidence level (High, Medium, or Low) for each field.

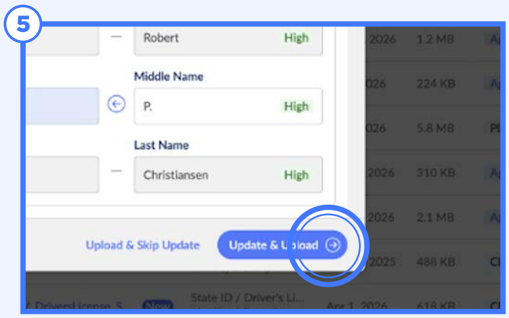
Review the extracted information carefully. You can correct any field before proceeding.

NOTE: If extracted data differs from what is already in the client record, you will be asked which data you'd like to use. An arrow (→) indicates a difference — select the one you want to keep.



5 Update & Upload

When everything looks correct, click **Update & Upload** to save the document and apply any data changes to the client record.



Ask Integrity AI-Supported Document Types

You can upload any type of document you'd like to Client records. However, Ask Integrity AI-powered data extraction is only available for the following document types. More types will be added in future releases.

Document type	What the AI does
Scope of Appointment (SOA)	Extracts appointment details, creates an SOA record, and sets sent/signed/completed compliance tags automatically. Tags expire after 1 year.
HIPAA Authorization	Extracts the authorization date, sets the HIPAA compliance tag, and automatically removes the tag when the authorization expires.
Medicare Card	Updates the client's Medicare Beneficiary ID, Part A effective date, and Part B effective date.
Medicaid Card	Updates the client's Medicaid eligibility information.
Medicare eApp Confirmation	Stores the receipt of a submitted Medicare application (from Connecture, Sunfire, or carrier portals).
Plan Comparison & Quote	Stored and categorized for client reference.
Illustration	Stored and categorized for client reference.

You can upload any other document type for secure storage, even if AI extraction is not yet supported. Your document will be stored in the client record for easy reference.