

## NEXTSTEP

### AUTOMATE YOUR FAX WORKFLOW



Are you tired of searching for specific patient information in a 50–page fax? Are you spending valuable time opening, renaming, and saving files over and over again? Do you find yourself asking, “Why isn’t there an easier way to index documents to the EMR?” If you routinely question whether there is a more efficient way of managing this repetitive administrative work, we’re happy to tell you there is. It’s called NEXTSTEP.

#### WHAT IS NEXTSTEP?

NEXTSTEP is Concord Technologies’ artificial intelligence (AI)–driven solution. It automates manual workflows by taking incoming faxes and providing document classification, data capture processing, and EHR system integration to improve your organization’s efficiency and reduce costs.



#### ***Document Classification and Workflow***

NEXTSTEP’s AI-driven classification abilities identify inbound, faxed documents and intelligently routes them to the correct individual or department. Instead of hours spent manually opening faxes and identifying where they should go, NEXTSTEP does the heavy lifting, freeing up time for more productive tasks.

Once the documents have been routed to the correct team, shared queues and folders give teams visibility into every step of the document’s journey within NEXTSTEP. Team members can easily scan who is working on a given document, identify the actions that have been taken, and see how far the document has progressed through a workflow. Tracking document workflow in one place reduces the pain points of individual follow-up and provides insight into workflow bottlenecks.



#### ***Data Extraction***

NEXTSTEP relieves the time-consuming burden of searching through documents, locating relevant information, and manually transferring that information into your preferred system. When a document is received, data – such as the patient’s name and date of birth, insurance plan, or information about the referring physician – is automatically captured. That extracted data can be used to route documents or can be used to look up and match the document with a patient chart in your EHR system.



### ***EHR Integration***

NEXTSTEP automatically searches inbound documents for specified patient data and identifies the document's type. This data can be made available to the user in the NEXTSTEP portal for review and validation. Once the user is finished with the document, it can be made available for the EHR to retrieve via an API or delivered to the EHR's HTTP endpoint. This retrieval/delivery process can also be triggered as soon as the extraction and classification processes complete, thus bypassing the NEXTSTEP portal and leaving the user to review and index the faxes directly in the EHR.



### ***Searchable Documents***

NEXTSTEP eases the frustration of scanning through pages and pages of documents in search of a specific word or phrase. Instead, image-based documents are converted to searchable, editable PDFs so you can easily find exactly what you're looking for.



### ***Quick Signature***

Instead of the exhausting process of opening, printing, signing, uploading, and faxing a signed document, NEXTSTEP makes it easy to digitally sign and fax a document without ever leaving the NEXTSTEP platform.



### ***File Name Change***

NEXTSTEP's data identification technology takes user-entered and/or automatically extracted metadata from a downloaded document — such as patient name, date of birth, and date of service — and automatically renames the file, allowing you to focus on more important tasks.

**READY TO LEARN MORE  
ABOUT NEXTSTEP?**

Click on the link below or contact your Concord Account Manager.  
[Learn More About Concord Technologies' NextStep](#)



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