

1. Introduction

Arctrieval's user-friendly web-based application enables legal professionals to obtain and manage medical and billing record requests related to their Client's case or claim.

2. Adding Users

Once your account is activated, issuing a request only takes a few quick steps.

1. Have your Client or the patient's Personal Representative sign the Arctrieval Intake form to obtain permission to use a digital image of their signature.
2. Enter the Client's information.
3. Upload the Arctrieval Intake Form Digital Signature Authorization signed by the Client or the patient's Personal Representative.
4. Add the information for the organization or facility that has you're the medical or billing records you seek.
5. Send a New Request

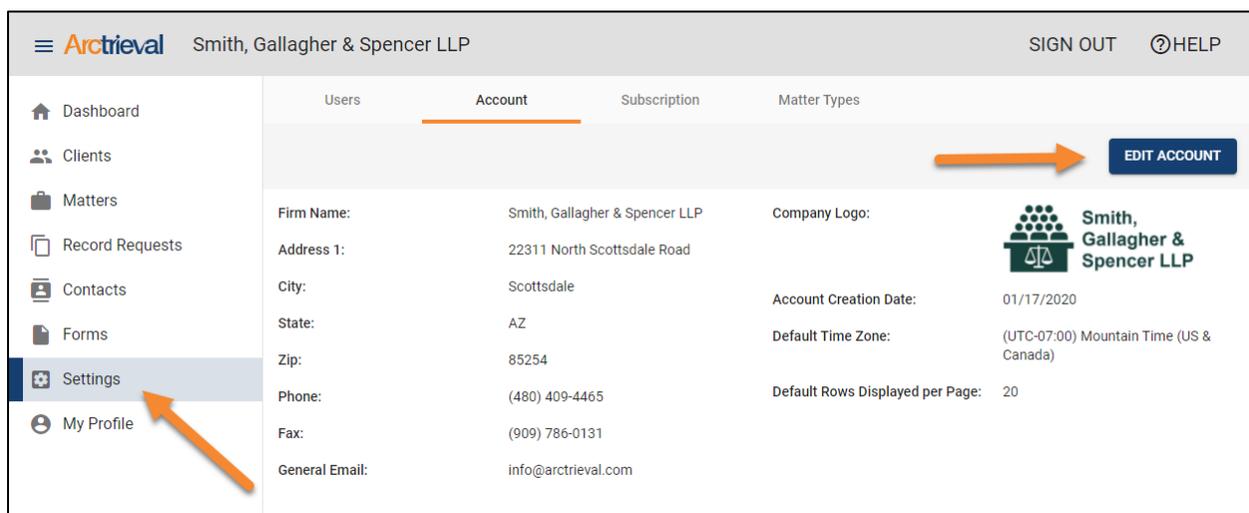
After issuing a request, the Arctrieval System automatically issues follow up notices at regular intervals until the requested information arrives in your office.

If you encounter any issues or roadblocks in obtaining the requested information, please contact us at Support@Arctrieval.com, and we will assist you to resolve the issue.

3. Additional Firm Information (Optional)

Before issuing your first request, you may want to add some additional information about your Firm. Your Firm's information, such as a logo, general email address, and fax number, are used as the contact information on the various forms and documents.

To add a logo, general email address, and fax number to your account, click the **Edit Account** button in the upper right corner on the Settings Account page, as shown in the image below.



After clicking the **Edit Account** button, the Edit Firm Account Information dialog box will appear on your screen, as shown in the following image. At this point, you may add additional information for your Firm, including a General Email address, Fax number, and Logo.

You may also edit any of the information and adjust the Default Time Zone based on the location of your Firm.

The key fields for the additional information are circled in Orange for your reference.

Edit Firm Account Information

Firm Name: *
Smith, Gallagher & Spencer LLP

Address 1: *
22311 North Scottsdale Road

Address 2:

City: * State: * Zip: *
Scottsdale AZ 85254

Phone: *
(480) 409-4465

Fax: *
(909) 786-0131

General Email:
info@arctrieval.com

Default Time Zone: *
(UTC-07:00) Mountain Time (US & Canada)

Default Rows Displayed per Page: 20

Upload Company Logo:
Choose a File...

Select image file in PNG or JPG file format to upload.

CANCEL SAVE CHANGES

4. Intake Forms: Digital Signature Authorization

Before adding a new Client to your Arctrieval account, the Client or their Personal Representative must sign the Digital Signature Authorization Form. Click on **Forms** in the left-hand navigation bar, and then click on the **Download** button to retrieve the appropriate form. Additional information on how to sign and obtain the Intake form is covered in Appendix A.

Arctrieval Smith, Gallagher & Spencer LLP SIGN OUT HELP

Dashboard
Clients
Matters
Record Requests
Contacts
Forms
Settings
My Profile

Intake Forms:

Client Digital Signature Usage Authorization: **DOWNLOAD**

Personal Representative Digital Signature Usage Authorization: **DOWNLOAD**