

1. Background

As part of Arctrieval's process, you will upload different documents to your Arctrieval account. The uploaded documents may include one or more of the following items:

1. Client photo ID or personal representative photo ID such as a driver's license, passport, state identification card, military ID, or other government-issued ID.
2. Birth Certificate
3. Custody Agreement
4. Guardianship affidavit, legal papers, or court order
5. Healthcare Power of Attorney
6. Death Certificate
7. Will, probate documents, or other court documents.
8. Appointment of Representative for Disability Clients (SSA-1696 Form)

The source documents may be in different sizes and orientations—especially when a client texts or emails a picture of their photo ID. As a best practice and for optimal results, you should convert the incoming documents to a standard PDF file with letter-sized pages in portrait orientation. It will avoid page size, page orientation, and file compatibility issues.

Converting documents to a PDF file with letter-sized pages in portrait orientation is accomplished in several different ways. You can use a PDF software package like Adobe Acrobat, Nitro, PDF Pro, or other software. You can also use Microsoft Word or Google Docs to quickly create a document in the respective software application and save it as a PDF file.

2. Create a PDF File from a Photo ID image

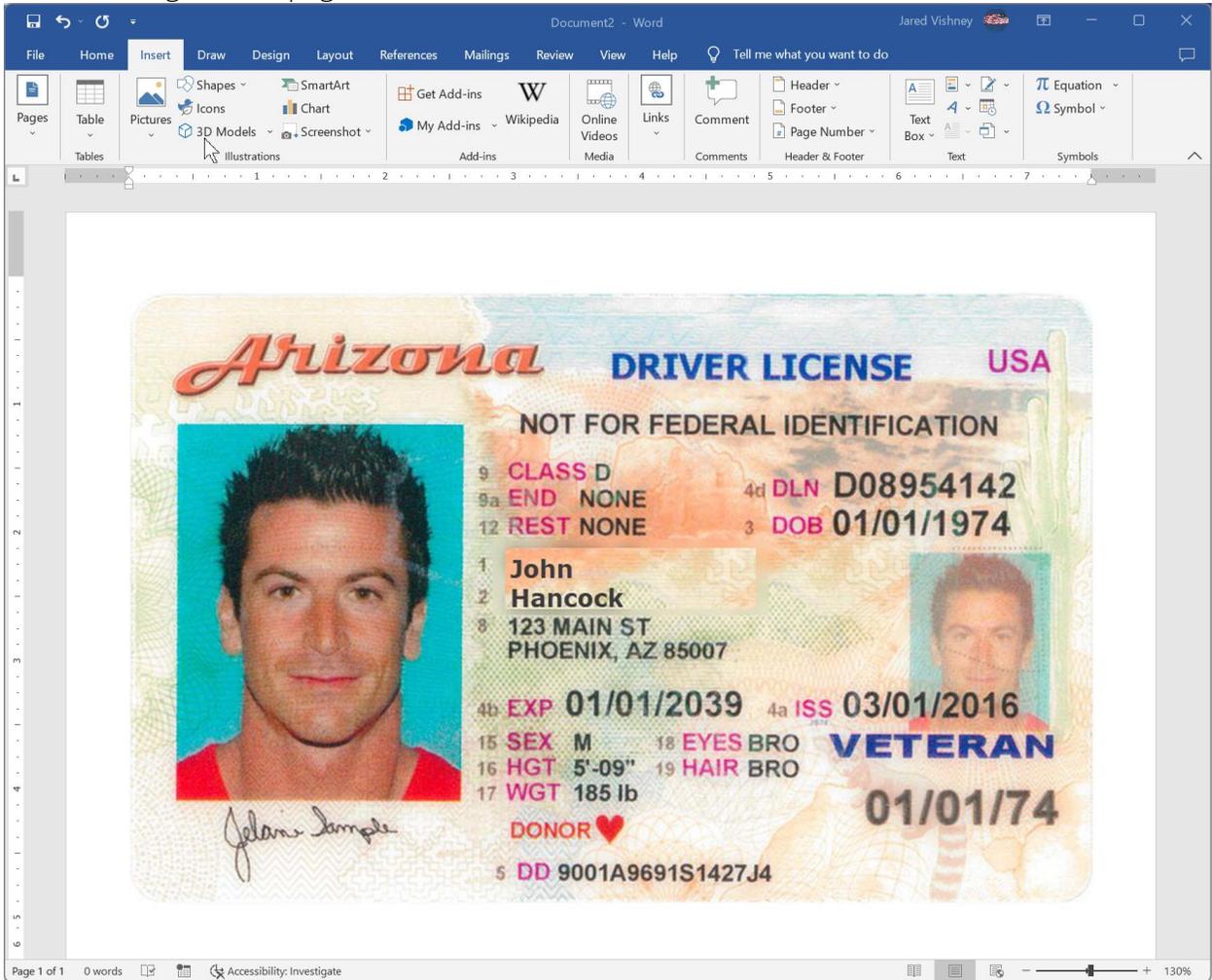
Arctrieval allows you to upload patient and personal representative photo IDs in many image file formats and as a PDF file. The best practice is to upload the photo ID as a PDF file to avoid potential issues. The directions below will show you how to quickly and easily convert an image file to a PDF file using Microsoft Word. You can use the same process with Google Docs.

1. Open Microsoft Word.
2. Click on the File tab -> New -> Blank document
3. Click on the Layout tab -> Margins -> Narrow
4. Click on the Insert tab -> Pictures -> This Device

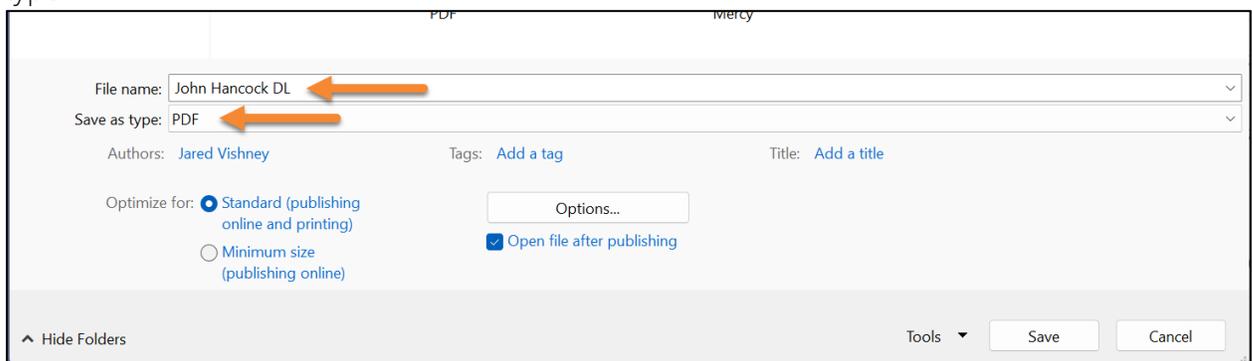
Working with Documents and Photo IDs

Best Practices

5. Select the image file with the photo ID and Click on Insert
Your Microsoft Word document should now look similar to the image below, with the photo ID almost as large as the page.

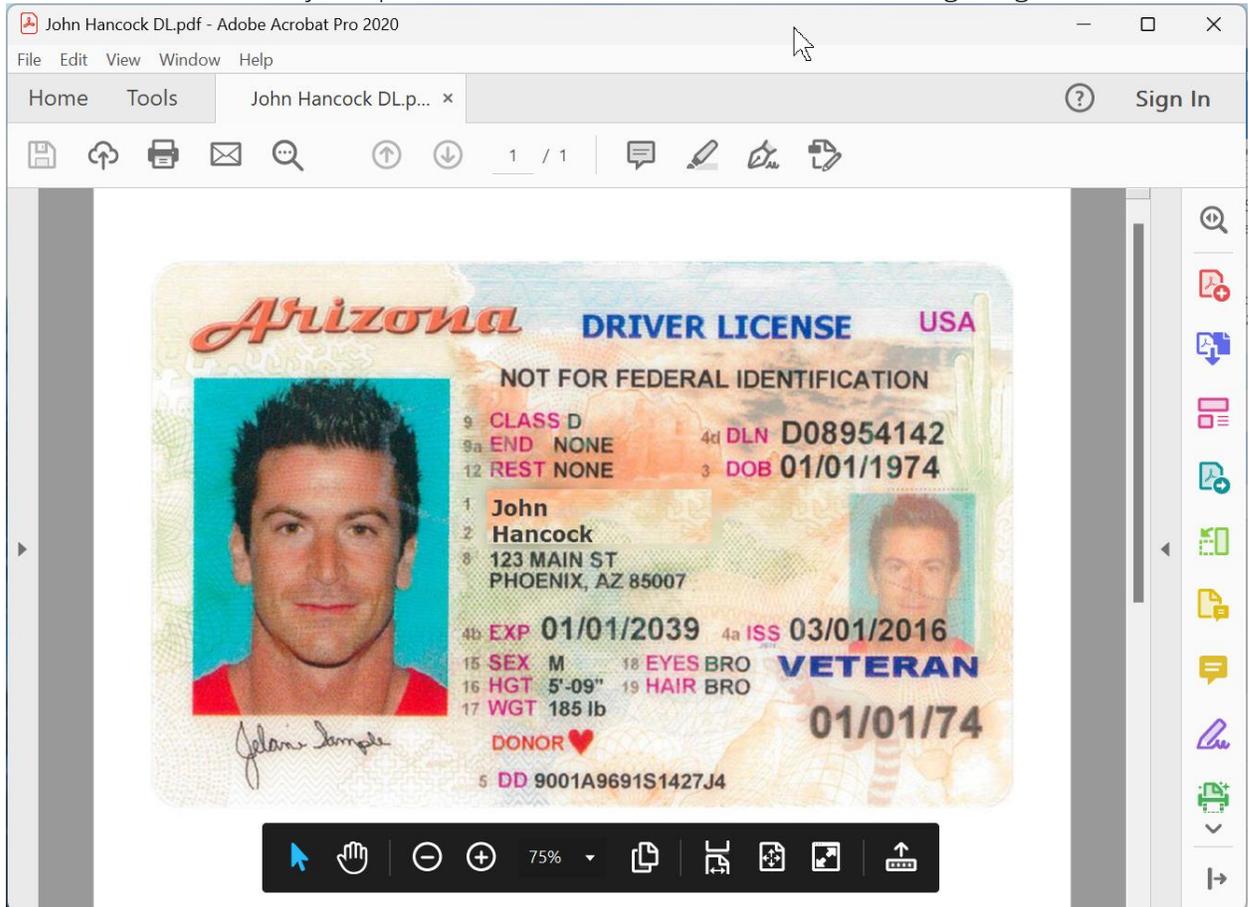


6. Click on the File tab -> Save As and pick a location to save the file.
7. Enter a name in the File name field, Select PDF for the Save as type value, and press the Save button. For example, in the image below, "John Hancock DL" is the file name, and PDF is the file type.



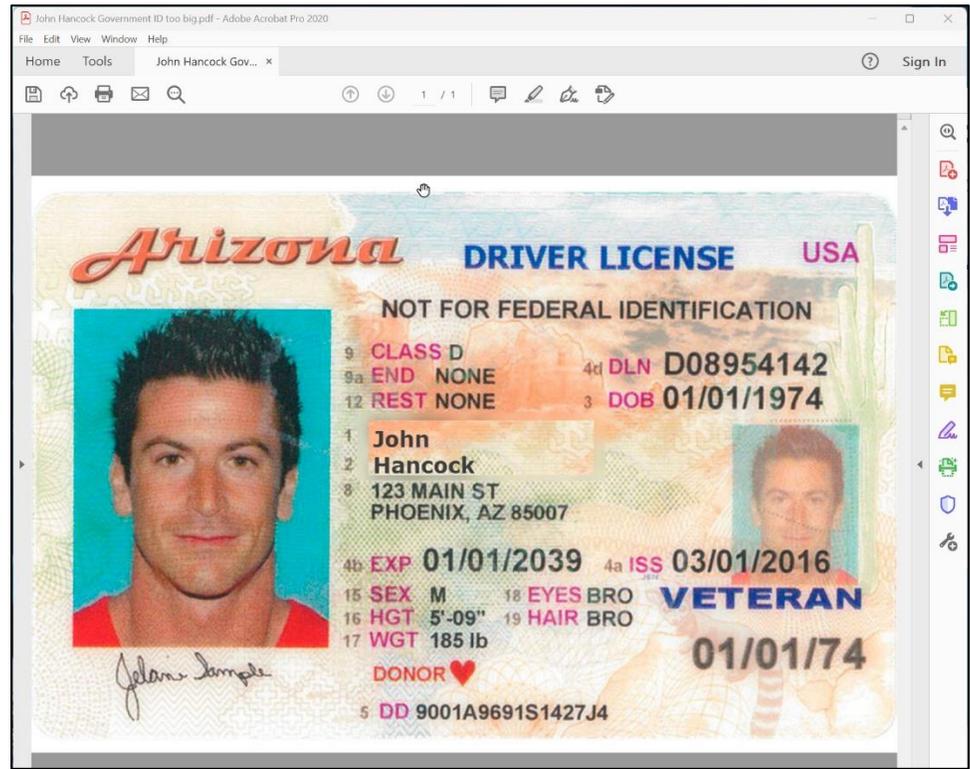
Working with Documents and Photo IDs Best Practices

- 8. The result is a PDF file with the photo ID properly sized, a letter-sized page, and a portrait orientation that is ready to upload to Arctrieval, as shown in the following image.

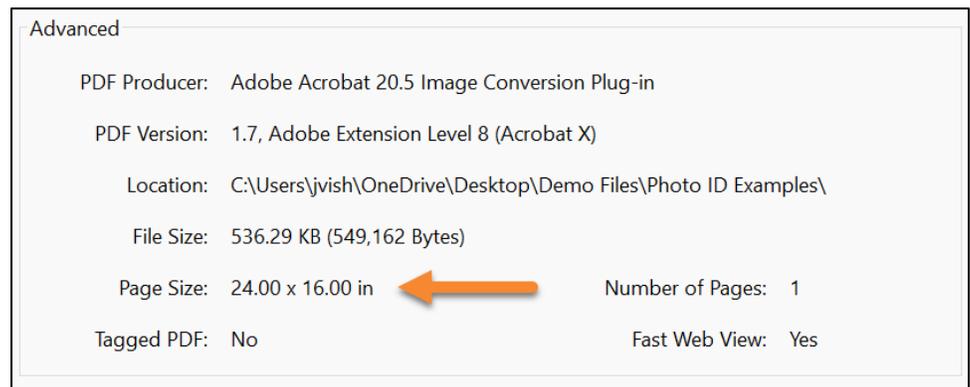


3. PDF page size and orientation

If you create a PDF file directly from an image, the PDF page size will likely be too large and have the wrong orientation. For example, the photo ID may look fine in the PDF file, but there are two issues. First, the page is huge, and second, the page is in a landscape orientation.



To determine the page size and orientation, look at the document properties in the image. The page size is 24.00 x 16.00 inches. The first number is the image's width, and the second is the height. The image is 24 inches wide by 16 inches high. For reference, a letter-size page is 8.5 inches wide and 11 inches tall.



The size and orientation requirements apply to all pages in any document uploaded to Arctrieval sent out with the request, such as the Patient Photo ID, Personal Representative Photo ID, Relationship Documentation, and any Optional Document attached to the request.

The easiest way to correct the problem is to use the Print as PDF functionality, as described below.

1. For Windows Users:
 - a. Open the PDF file.
 - b. Select the Print function.
 - c. Set the Printer to Microsoft Print to PDF
 - d. Press the Print button.
 - e. The Save Print Output As dialog box will open.
 - f. Choose a File Name and location to store the new PDF file.
2. For Apple Users:
 - a. Open the PDF file; in the menu bar at the top of the screen, select File > Print.
 - b. A printing dialog will open up. Ignore the Print button. You will see a small drop-down menu near the bottom of the Print window labeled "PDF." Click on it.
 - c. In the PDF drop-down menu, select "Save as PDF."
 - d. The Save dialog will open up. Type the file name you'd like and choose the location, then click "Save."