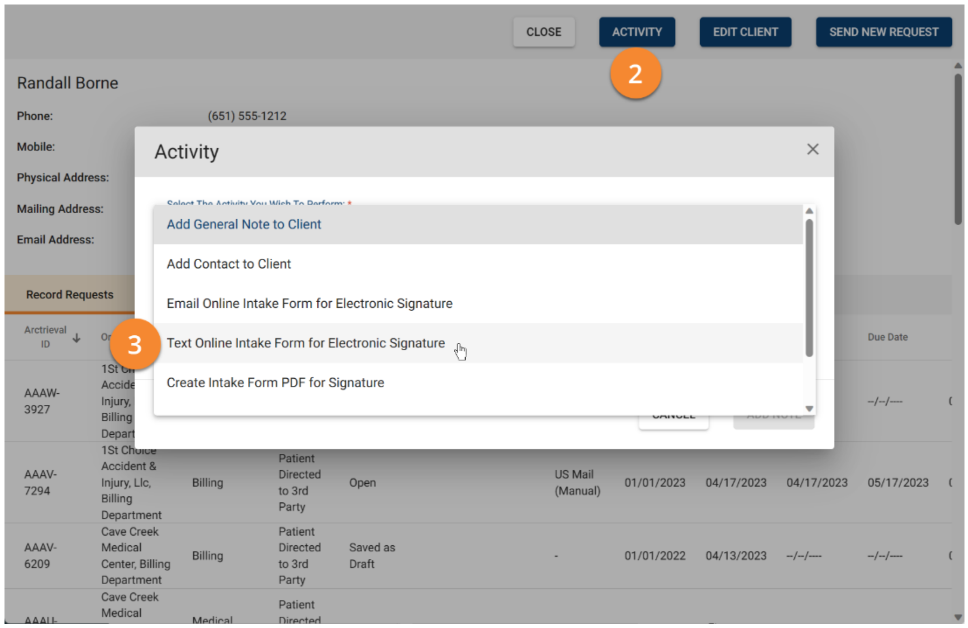
1. Texting Online Intake —Quick Steps

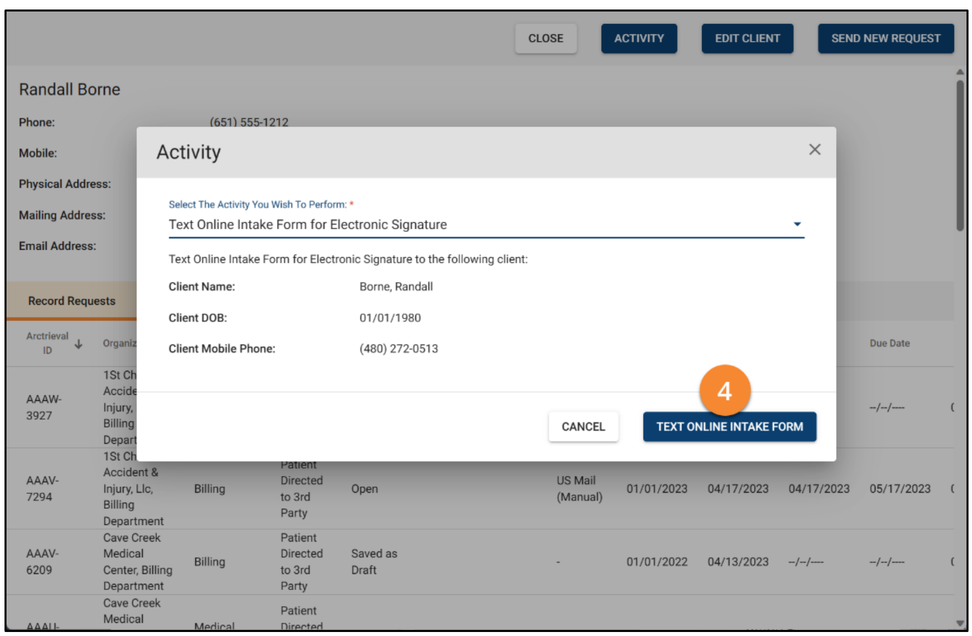
After the Client and optional Personal Representative information is entered into Arctrieval, the steps below show how to text the Online Intake Form to the client or Personal Representative.

1. Select the Client from the Clients data table.
2. Click the Activity button.
3. Select "Text Online Intake Form for Electronic Signature" from the dropdown menu.



4. Click the Text Online Intake Form button.

   Provided there are no issues with the mobile number, the Client or optional Personal Representative will receive the text in under 10 seconds. The text will contain a link to the Online Intake Form they can sign using their Smartphone.



2. Background

Arctrieval enables the Client or Personal Representative to sign the required Intake Form on their Smartphone or another touch-enabled device. Research shows that most texts are read within 3 minutes of being sent, with an average response time of 90 seconds. Therefore, most people should read the text and sign the required Intake Form in minutes.

However, some people are not technology savvy, may need some assistance, may not see the text, or do not trust a link in a text. Calling and walking the Client or Personal Representative through the process provides an opportunity to create goodwill and ensures you have everything you need to request medical records and billing statements through Arctrieval.

The rest of the document provides a call script and visual aides to assist you with the Client or Personal Representative to obtain their signature on the Online Intake Form.

The call script is a guide; you should modify it to suit your communication style and adhere to firm guidelines. For example, if the firm wants you to address Clients and Personal Representatives by their first name or, more formally.

3. Establish Contact

Before sending the text, call the Client or Personal Representative and say the following:

> *Hello (Client's or Personal Representative's Name).*
>
> *My name is (first name), and I am with (firm name). I am calling you about your case. We need you to sign a form that allows us to get medical and billing records faster and resolve your case sooner. Do you have four minutes to work with me at this time?*

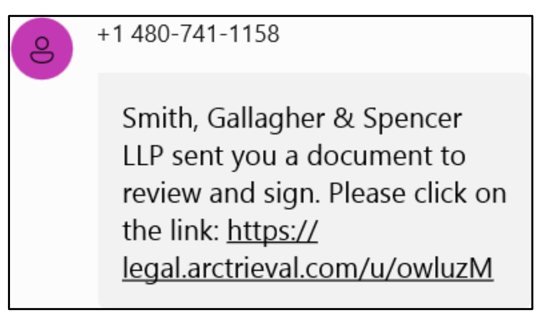
If the Client or Personal Representative says no, ask them for a time that works for them. Please note the time and call them back at the indicated time.

If the Client or Personal Representative says yes, then continue:

> *Thank you (Client's or Personal Representative's Name). In a moment, I will text you and walk you through the steps to sign the document on your mobile phone. Before we begin, please confirm that you have your mobile phone with you.*

The Client or Personal Representative must have their Smartphone with them. Confirming the mobile number in Arctrieval before sending the text is also a good idea. If everything is ready, then text the Online Intake Form to the Client by following the Quick Steps above and communicate the following:

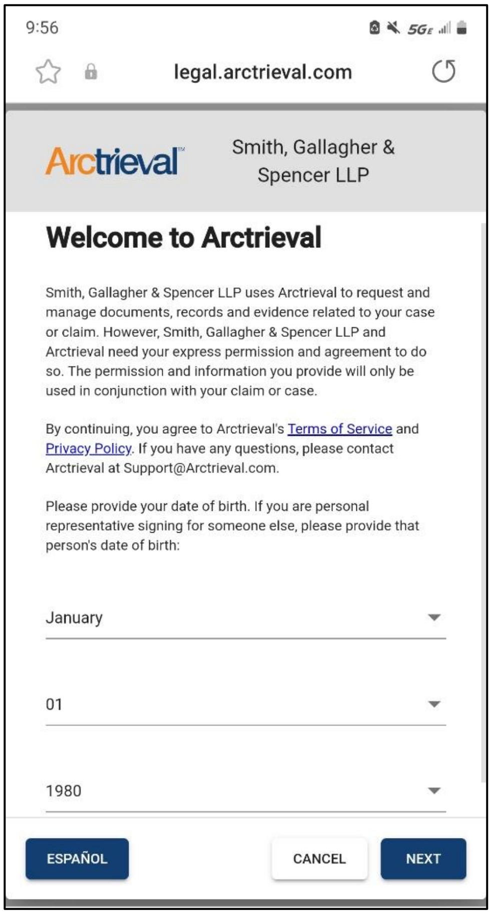
> *I just sent you a text through our record retrieval software program. The text came from 480-741-1158 and read, "(Your Firm Name) sent you a document to review and sign. Please click on the link: (Unique Link).*



4. Signature Process

Once the Client or Personal Representative receives the text, you instruct them to click on the link in the text. They will be taken to a webpage on their Smartphone.

4.1. Welcome to Arctrieval



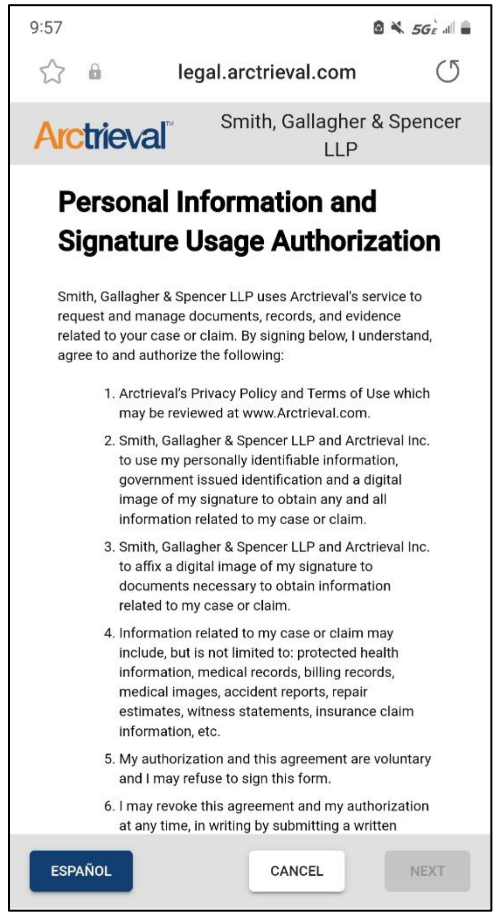
Instruct the Client to enter their date of birth. The personal representative will enter the date of birth of the person they represent. After entering the birth date, they will press the Next button.

They have three attempts to enter the date of birth before deactivating the form. If this happens, you can send another text.

Pressing the Español button switches all the text and interface to Spanish.

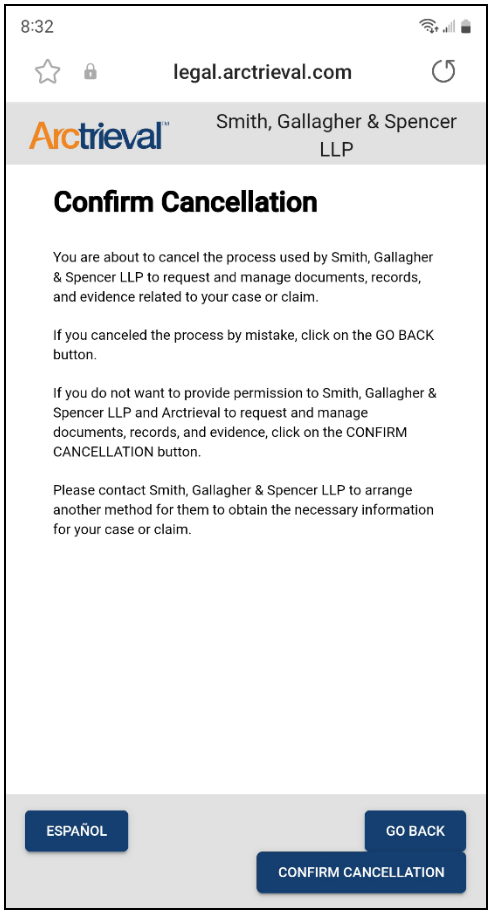
Pressing the Cancel button terminates the entire online signature process.

4.2. Review Online Intake Form



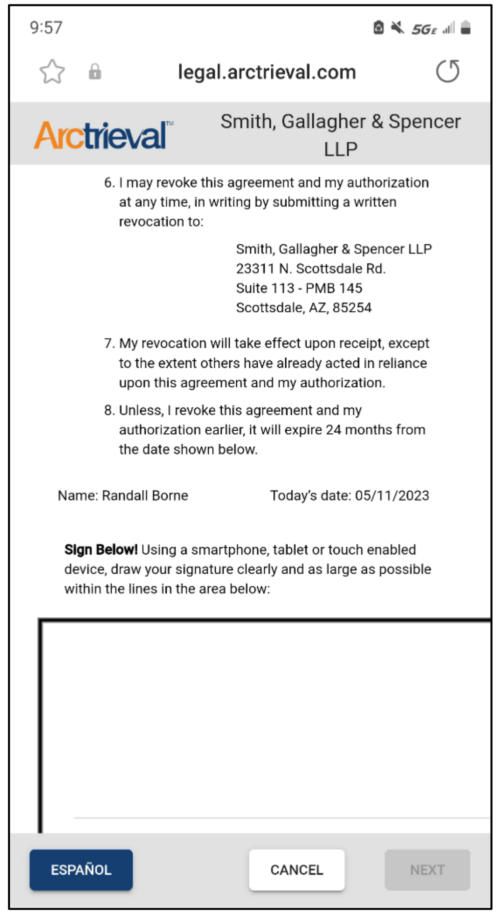
The Client or Personal Representative will then be able to review the Online Intake Form. Depending on their device and screen size, they may have to scroll down to read the entire document.

4.3. Confirm Cancellation



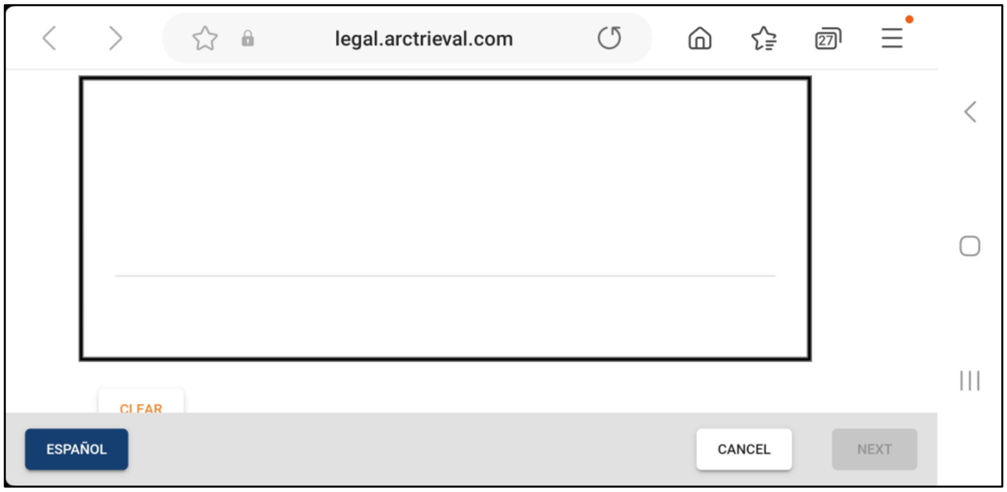
Pressing the Cancel button at any point in the process will display the Confirm Cancellation page. Pressing Confirm Cancellation will end the Online Intake Form process and deactivate the link. If the Client or Personal Representative cancels the process, you must send them a new text with a new link.

4.4. Signature Box Location



Scrolling to the bottom of the page reveals a box where the Client or Personal Representative can sign their name. As a best practice, instruct the Client or Personal Representative to turn their Smartphone on its side to place it in landscape display mode.

4.5. Signing in the Box

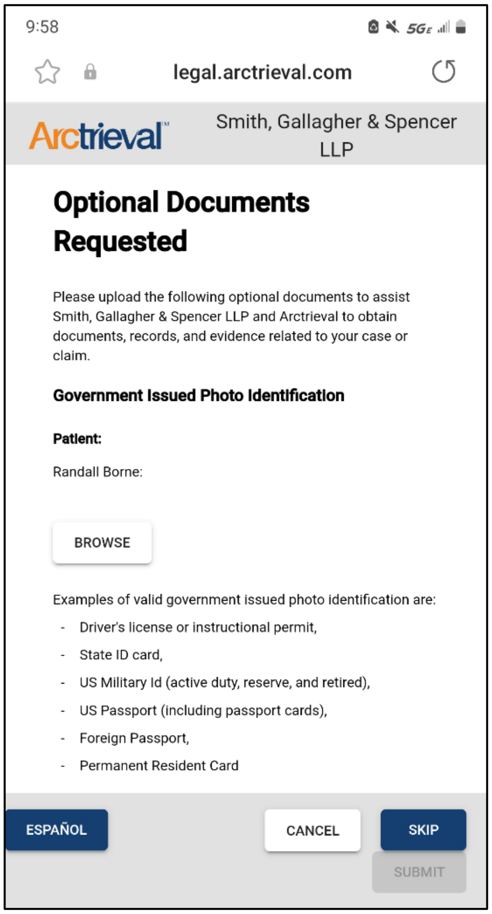


Using their finger or stylus, the Client or Personal Representative should sign in the box as neatly and clearly as possible.

If they make a mistake or want to redo their signature, they just need to click the Clear button under the box. The Clear button will erase all the information in the signature box and allow them to start over.

Once they are happy with their signature, they will press the Next Button.

4.6. Optional Documents

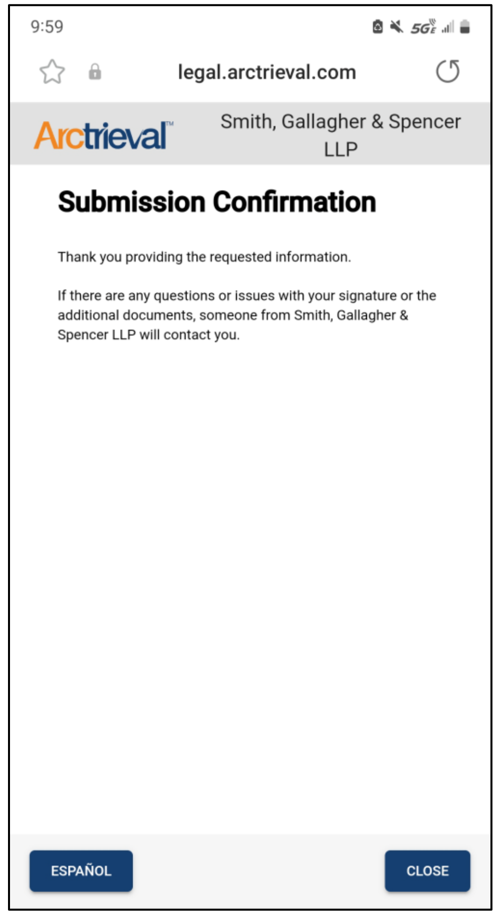


If the Client or Personal Representative has a copy of their government-issued photo ID on their Smartphone, they can upload it to their record in Arctrieval.

They should press the Skip button if they do not have an image readily available.

You can have the Client or Personal representative email or text you a copy of their photo ID later. It is not required, but a best practice to include it with the request.

4.7. Confirmation



After the Client or Personal Representative presses the Skip or Submit button from the previous screen, they are shown a Submission Confirmation.

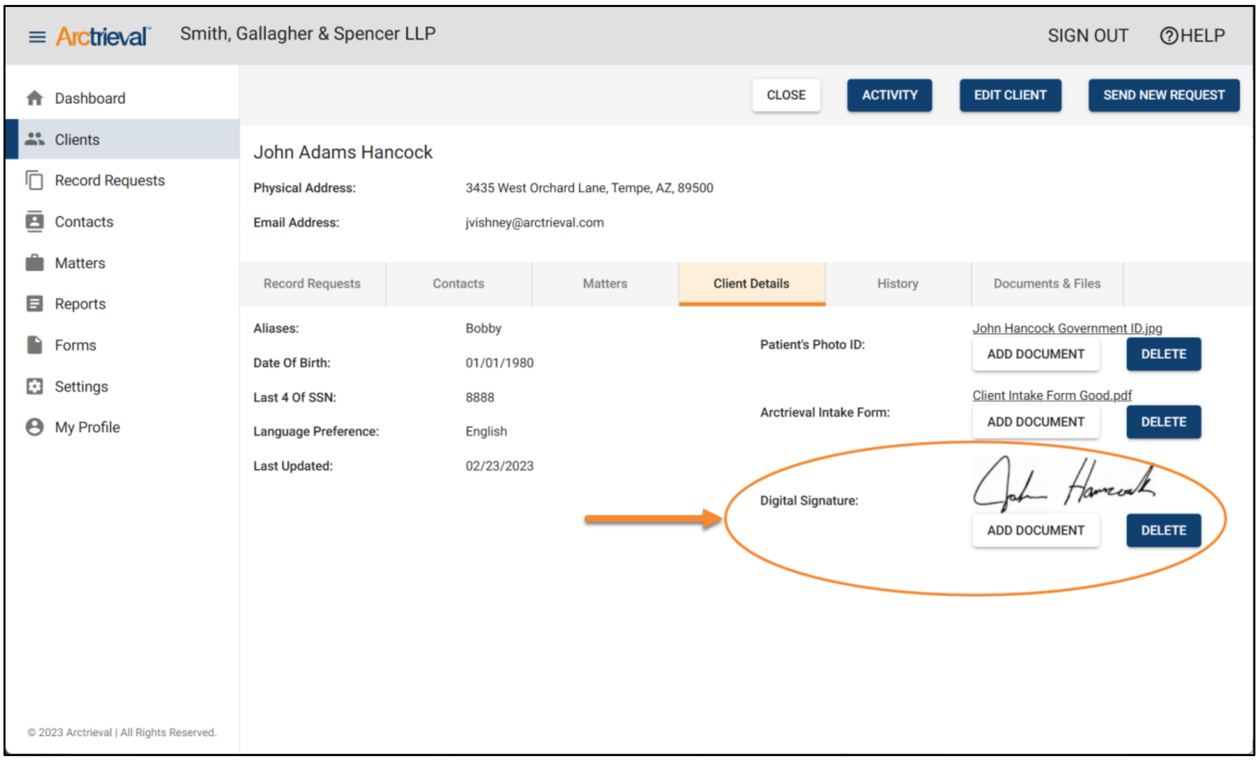
If you added your firm's website URL to your Arctrieval account, the Client or Personal Representative will see a Close button.

Pressing the Close button will redirect your client to the firm's website.

5. Verifying the Signature

Before ending the call with the Client or Personal Representative, it is a good idea to review the signature in Arctrieval. You may have to refresh your browser to reload the page to see the signature.

Click on the Client Details sub-menu; the signature is next to the Digital Signature field, as indicated in the image.



If there is any issue with the signature, repeat the process with the Client or Personal Representative by sending another link.

The link sent to the Client or Personal Representative automatically expires after five days. If the link expires, send another text to the Client or Personal Representative.