

Intake Forms

Texting to Client or Personal Representative

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.

Activity

- Add General Note to Client
- Add Contact to Client
- Email Online Intake Form for Electronic Signature
- Text Online Intake Form for Electronic Signature**
- Create Intake Form PDF for Signature

4. Click the Text Online Intake Form button.

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

Activity

Select The Activity You Wish To Perform: *

Text Online Intake Form for Electronic Signature

Text Online Intake Form for Electronic Signature to the following client:

Client Name: Borne, Randall

Client DOB: 01/01/1980

Client Mobile Phone: (480) 272-0513

TEXT ONLINE INTAKE FORM

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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, sign the required Intake Form, and take a picture of their photo ID in minutes.

However, some people are not technology savvy, may need assistance, may not see the text, or may 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 using the Online Intake Form and their Smartphone.

The call script is a guide; you should modify it to suit your communication style and adhere to firm communication 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 you could 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 a few minutes to work with me at this time?

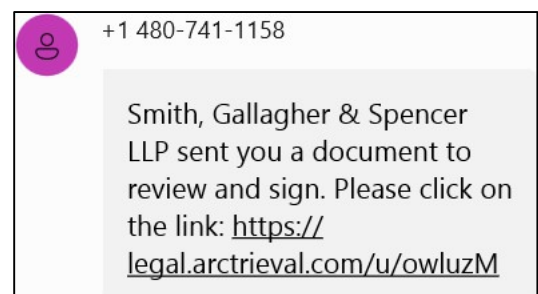
If the Client or Personal Representative says no, ask them for a time that works for them. Please note the time and call them back at the indicated time.

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).



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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, as shown below.

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.

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4.3. Confirm Cancellation

8:32 legal.arctrieval.com

Arctrieval™ Smith, Gallagher & Spencer LLP

Confirm Cancellation

You are about to cancel the process used by Smith, Gallagher & Spencer LLP to request and manage documents, records, and evidence related to your case or claim.

If you canceled the process by mistake, click on the GO BACK button.

If you do not want to provide permission to Smith, Gallagher & Spencer LLP and Arctrieval to request and manage documents, records, and evidence, click on the CONFIRM CANCELLATION button.

Please contact Smith, Gallagher & Spencer LLP to arrange another method for them to obtain the necessary information for your case or claim.

ESPAÑOL GO BACK 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

9:57 legal.arctrieval.com

Arctrieval™ Smith, Gallagher & Spencer LLP

6. I may revoke this agreement and my authorization at any time, in writing by submitting a written revocation to:

Smith, Gallagher & Spencer LLP
23311 N. Scottsdale Rd.
Suite 113 - PMB 145
Scottsdale, AZ, 85254

7. My revocation will take effect upon receipt, except to the extent others have already acted in reliance upon this agreement and my authorization.

8. Unless, I revoke this agreement and my authorization earlier, it will expire 24 months from the date shown below.

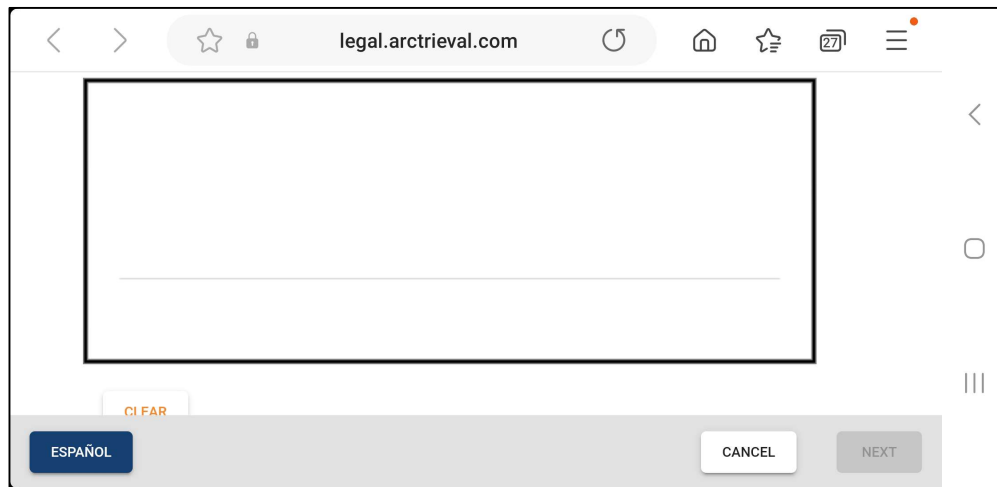
Name: Randall Borne Today's date: 05/11/2023

Sign Below! Using a smartphone, tablet or touch enabled device, draw your signature clearly and as large as possible within the lines in the area below:

ESPAÑOL CANCEL NEXT

Scrolling to the bottom of the page is a box where the Client or Personal Representative will 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. There should be no extra marks in the box--only the signature.

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

Below is an example of a good signature. It almost fills the box, remains within the lines, and has no stray marks.



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

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4.6. Optional Documents

9:58 5G

legal.arctrieval.com

Arctrieval Smith, Gallagher & Spencer LLP

Optional Documents Requested

Please upload the following optional documents to assist Smith and Gallagher and Arctrieval to obtain documents, records, and evidence related to your case or claim.

Government Issued Photo Identification

Patient:
Randall Borne

UPLOAD CAPTURE

Examples of valid government issued photo identification are:

- Driver's license or instructional permit,
- State ID card,
- US Military Id (active duty, reserve, and retired),
- US Passport (including passport cards),
- Foreign Passport,
- Permanent Resident Card

Only the front of the identification is needed. The file can be a picture of the identification taken with a smart phone. Please make sure the file is in the JPEG format, between 800 to

ESPAÑOL CANCEL SKIP SUBMIT

If the Client or Personal Representative has a copy of their photo ID on their Smartphone, they can upload it to their record in Arctrieval. Or they press the Capture button to take a picture of their photo ID using their SmartPhone.

If the Client has a Personal Representative, there will be an option for each person on the screen to upload or capture each photo ID separately.

If the Client or Personal Representative does not have a photo ID or does not want to provide a copy, they should press the Skip button.

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

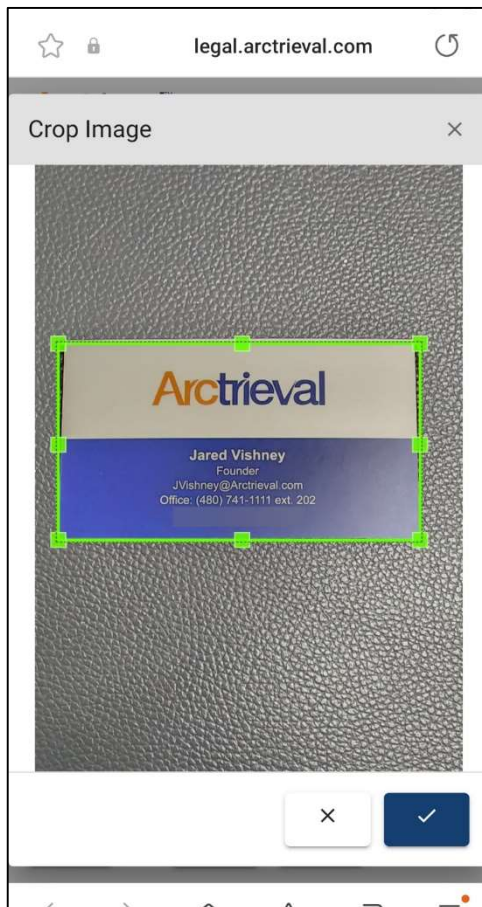
4.7. Capture an Image of the Photo ID



After the Client or Personal Representative presses the Capture button from the previous screen, the camera application is opened on their Smartphone to take a picture of their photo ID.

After the Client or Personal Representative takes the picture, they can review the image. Retry allows them to take another photo. Clicking OK will submit the image for the next step.

4.8. Cropping the Photo ID

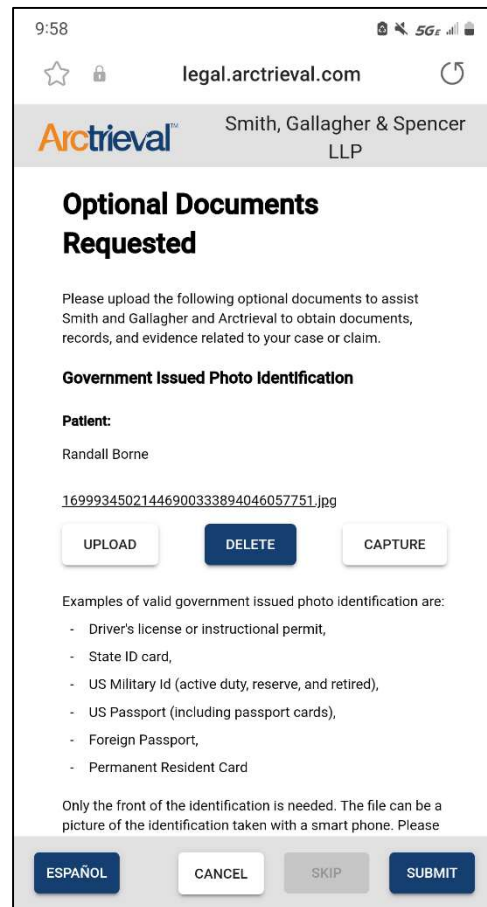


The Client or Personal Representative can now crop the image of the photo ID by moving the green crop marks on their device.

The Client or Personal Representative should align the green lines on the edges of the photo ID.

Once everything is lined up, press the Check Mark button to move forward.

4.9. Additional Options



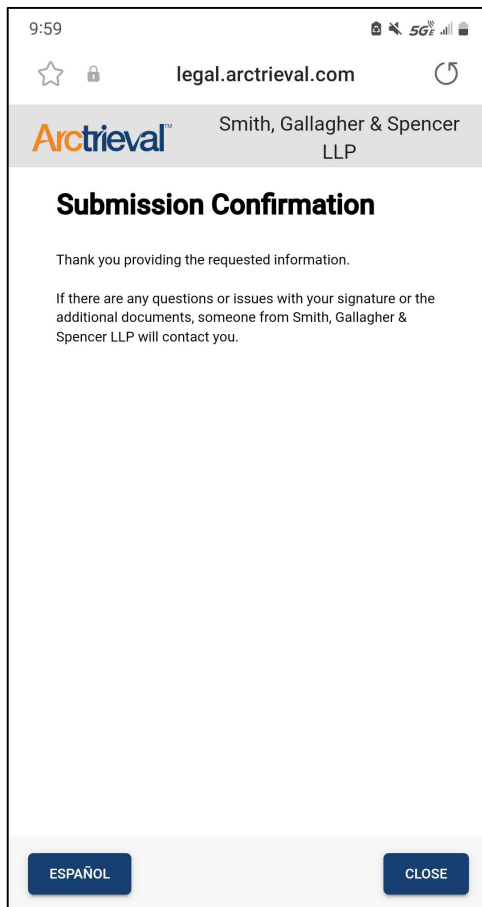
After the Client or Personal Representative completes the image capture process, they will see the screen in the image.

The Client or Personal Representative can upload a different photo ID, delete the image, or capture a new image.

The next step is for the Client or Personal Representative to press the Submit button to save their signature and photo ID to their record in Arctrieval.

Please have the client be patient. Everything should be processed and saved in 10 to 15 seconds.

4.10. 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.

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5. Verifying the Signature

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

Click on the Client Details sub-menu; the signature is next to the Digital Signature field, and the photo ID is next to the Patient's Photo ID, as indicated in the image.

Arctrieval Smith and Gallagher SIGN OUT HELP

Dashboard CLOSE ACTIVITY EDIT CLIENT SEND NEW REQUEST

Clients

Record Requests

Contacts

Matters

Reports

Forms

Settings

My Profile

Randall Borne

Phone: (651) 555-1212

Mobile: (480) 272-0513

Physical Address: 2326 Minnehaha Ave East, St. Paul, MN 55119

Email Address: test@m-c-unlimited.com

Record Requests Contacts Matters Client Details History Documents & Files

Aliases: Smith

Date Of Birth: 01/01/1980

Last 4 Of SSN: 5555

Language Preference: English

Last Updated: 11/13/2023

Linked To The Data In Filevine: Yes

Patient's Photo ID: Borne_PhotoID_11132023.jpg ADD DOCUMENT DELETE

Arctrieval Intake Form: Borne_eIntakeForm_Signed_11132023.pdf ADD DOCUMENT DELETE

Digital Signature: [Signature] ADD DOCUMENT DELETE

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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.