

## Welcome

We are excited about collaborating with you and are grateful for the chance to address your medical and billing records challenges. We meticulously crafted a Customer Success Plan and Training Agreement to ensure you derive maximum value and attain the desired outcomes from your Arctrieval subscription.

This comprehensive plan delineates your journey with Arctrieval, from the initial account setup to achieving mastery of our software within your firm. It outlines our respective roles and responsibilities, fostering a collaborative partnership aimed at your success.

We are confident that you'll achieve the promised results by adhering to the methodology and leveraging the software as intended. We are committed to supporting you every step of the way and look forward to empowering your team with the tools and knowledge needed to thrive.

## Complimentary Training Program

At Arctrieval, we believe in the transformative power of our software and are committed to ensuring that every customer experiences its full potential. While enrollment in our Customer Success Plan and Training Program is mandatory for all new customers, we're confident that we will meet and exceed your expectations with your active participation in our tailored methodology and utilizing our software as intended.

To underscore our confidence, Arctrieval offers a unique assurance: **a full-fee refund to all qualifying customers**. This isn't a credit for services; **it's a straightforward and complete refund**. To qualify for the refund, each licensed user within your account must attend our comprehensive training sessions, ensuring they have the knowledge needed to leverage our software effectively. Additionally, each licensed user must issue at least ten requests per month during the initial four months of service. This ensures active engagement and platform utilization. Finally, the service must remain active for a consecutive four-month period to qualify for the refund.

We believe in our software's ability to deliver tangible results for your organization, and our training fee refund program underscores our commitment to your success. We look forward to embarking on this journey with you and empowering your team with the tools and knowledge needed to thrive.

## Customer Success Plan and Training Packages

Arctrieval is dedicated to ensuring that every customer receives the support and guidance they need to succeed with our software. To facilitate this, we offer comprehensive Customer Success Plans paired with training packages tailored to meet your organization's unique needs. Our one-time fee covers account configuration, setup, staff training, access to our customer success plan, and ongoing support.

Subscription Plan Level	One-time Fee	Included Training Hours
Essentials (Single User)	\$339.00	3
Plus (Up to Five Users)	\$539.00	5
Advanced (Up to 10 Users)	\$739.00	7
Advanced 20 (Up to 20 Users)	\$1,039.00	9
Advanced 30 (Up to 30 Users)	\$1,339.00	12

Our tiered pricing structure ensures that organizations of all sizes can access the training and support they need to maximize the benefits of Arctrieval's software. Whether you're a small team or a large enterprise, we're committed to empowering you with the knowledge and resources necessary for success.

## Plan and Training Overview

Embark on your path to mastering the individual right of access request methodology and Arctrieval's cutting-edge software through a meticulously designed series of stages:

- 1. Account Setup and Configuration:** Kickstart your journey with expert guidance on account setup, configuration, and integration activation. Delve into Client Intake form training to ensure seamless operation from the start.
- 2. Arctrieval Baseline Software Training:** Dive into Arctrieval's software fundamentals, equipping yourself with essential knowledge and skills to navigate the platform effectively.
- 3. Arctrieval Integration Training:** Tailored integration training is provided as needed, enabling you to seamlessly integrate Arctrieval into your existing case management software and workflows.
- 4. 30-Day Customer Success Checkpoint:** At the 30-day mark, engage in a comprehensive Customer Success checkpoint to assess progress, address challenges, and refine strategies for optimal performance.
- 5. 60-Day Customer Success Checkpoint:** Revisit your journey at the 60-day milestone, leveraging insights to optimize your Arctrieval software utilization and maximize benefits.
- 6. 90-Day Customer Success Checkpoint:** Three months in, take stock of your achievements and milestones with dedicated support to propel you toward continued success.
- 7. 120-Day Customer Success Checkpoint:** Conclude your initial journey with a thorough Customer Success checkpoint at the 120-day mark, celebrating successes and fine-tuning strategies for sustained excellence.

Each stage of your journey is meticulously crafted to ensure seamless progression and maximum value realization. With Arctrieval's guidance and support, you'll confidently navigate each phase, emerging as a master of the individual right of access methodology and a proficient user of our innovative software.

## Account Setup and Configuration Process

At Arctrieval, we understand the importance of a seamless account setup to ensure you hit the ground running. Arctrieval's team will guide you through the process via Zoom. Together, we'll navigate the account setup and configuration process, setting the stage for success with our innovative software.

During the session, our team will work closely with you:

1. **Establish Your Account:** We'll help you set up your account, ensuring all necessary information is accurately captured to tailor the platform to your needs.
2. **Add Users:** Learn how to add users to your account, assigning roles and permissions as needed to facilitate smooth workflows.
3. **Configure System Options:** Understand and configure system options to align with your organization's processes and preferences.
4. **Enter Payment Information:** Our team will guide you through entering payment information securely, ensuring your monthly subscription is activated correctly.
5. **Review Customer Success Plan:** Gain insight into our comprehensive Customer Success Plan, which will support your journey to success with Arctrieval's software.
6. **Initial Training on Client Intake Form:** Receive guidance on the Client Intake Form and best practices for obtaining the Client's signature on the individual right of access request.

Attendance by system administrators is crucial for maximizing the session's effectiveness. Typically lasting between 30 and 45 minutes, the session accommodates any questions or clarifications.

Once your account setup is completed, the Customer Success Plan fee is charged to the payment method on file for your monthly subscription.

## Arctrieval Baseline Training

Our baseline training offers a comprehensive overview of the steps in issuing an individual right of access request through Arctrieval's platform. This training is integral to your onboarding process and will equip you with the skills and knowledge to navigate our software seamlessly.

During the account configuration session, you'll be tasked with a "homework" assignment: obtaining three to five client signatures on either the Client Intake Form or the Personal Representative Intake Form. These forms are the foundation for training, providing hands-on experience as you learn to:

1. **Add Client Information:** Understand how to input client details and demographics and upload the Client Intake form into Arctrieval for signature extraction.
2. **Upload Supporting Documentation:** Learn to upload and manage supporting documentation within the platform, facilitating complete and accurate requests sent to providers.
3. **Add Medical Provider Information:** Familiarize yourself with adding medical provider information to Arctrieval, ensuring requests are delivered to the correct location.
4. **Issue Individual Right of Access Requests:** Master the steps involved in issuing individual access requests to medical providers, starting the clock for a 30-day response time.

The training session typically lasts 60 minutes and is recorded. The recording is available for download, allowing you to review the material at your own pace, reinforce your understanding of the platform's functionalities, or share it with your colleagues.

With Arctrieval baseline training, you'll gain the confidence and expertise needed to leverage our platform effectively, setting the stage for success in managing individual right of access requests.

## Arctrieval Integration Training

Our integration training offers a comprehensive overview of how Arctrieval collaborates seamlessly with various case management systems. You'll learn how Arctrieval and your chosen case management system work together harmoniously.

Our expert trainers will walk you through the integration functionality, highlighting key features and demonstrating how to optimize your operations by leveraging the combined power of both platforms. The training session lasts 30 minutes and is recorded and made available for download, allowing you to review the material at your own pace and reinforce your understanding of the integration's capabilities.

With Arctrieval integration training, you'll unlock the full potential of our platform, harnessing the benefits of seamless integration with your case management system to drive productivity and success in your organization.

## Customer Success Checkpoints

Over the initial 120 days of your Arctrieval journey, our Customer Success Team is by your side every step of the way. Our goal is to ensure your experience with Arctrieval exceeds expectations, and we achieve this through regular check-ins, support, and tailored assistance to meet your evolving needs.

During these checkpoints, we'll:

1. **Assess Progress:** We'll evaluate your progress and adoption of Arctrieval to ensure you can achieve software mastery and maximize its benefits for your organization.
2. **Address Questions:** Our team will be available to answer your questions or concerns, providing prompt and comprehensive support to address your needs effectively.
3. **Schedule Additional Training:** If necessary, we'll schedule additional training sessions to enhance your understanding of Arctrieval's functionalities further and optimize your platform utilization.
4. **Monitor Usage:** We'll monitor your usage of Arctrieval, ensuring you're actively issuing requests for records and leveraging the platform to its fullest potential.
5. **Best Practices:** We'll provide tips and tricks and share information on what other firms have done to streamline their records retrieval process.

Our commitment is to ensure everyone within your organization is comfortable and confident using Arctrieval. By actively engaging with our Customer Success Team during these checkpoints, you'll receive personalized support and guidance to unlock the total value of our software.

## Additional Resources and Training

At Arctrieval, we understand the importance of ongoing support and resources to ensure your team's success with our software. That's why we offer an extensive library of guides and self-paced videos, readily accessible to all users on our website at [www.arctrieval.com/support](http://www.arctrieval.com/support).

While the training program and hours outlined earlier are designed to equip your staff with the necessary skills to master Arctrieval's software, we recognize that every organization has unique needs. If additional training is required for your firm, we strive to accommodate your requirements at no extra cost whenever possible.

However, in cases where multiple new staff members require training or the training substantially exceeds the included hours, additional training hours are available at a time and materials rate of \$99 per hour. Rest assured, we will always notify you in advance of any potential charges, ensuring transparency and alignment with your budgetary considerations.

With Arctrieval, you'll have access to the resources and support needed to optimize your experience with our software and drive success for your organization. We're committed to your ongoing growth and are here to support you every step of the way.

## Agreement

I agree to the Customer Success Plan and Training Program and associated one-time fee as outlined above.

---

Firm Name

---

Signature

---

Printed Name

---

Date