

## Welcome

We look forward to working with you and appreciate the opportunity to tackle your medical and billing record challenges using Arctrieval's software. We have created a Customer Success and Training Plan to ensure you get the maximum value and achieve the expected results from your Arctrieval subscription. The plan outlines your journey with Arctrieval from the initial account setup to your firm's software mastery and describes our mutual roles and responsibilities. We know that if you follow the methodology and use the software as designed, you will get the results we claim.

## Customer Success Plan and Training Fee

Arctrieval has a one-time fee for all new customers for account configuration and setup, staff training, customer success checkpoints, and ongoing customer support as follows:

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

## Plan and Training Overview

Mastering the request methodology and Arctrieval's software has the following stages:

1. Account onboarding, setup, and configuration—20 minutes plus Q&A.
2. Arctrieval overview recording for staff to review.
3. First live Arctrieval training session—45 minutes plus Q &A.
4. Second live Arctrieval training session—45 minutes plus Q&A.
5. Arctrieval integration training as needed—30 minutes plus Q&A.
6. 30-day Customer Success checkpoint.
7. 60-day Customer Success checkpoint.
8. 90-day Customer Success checkpoint.
9. 120-day Customer Success checkpoint.

## Account Setup and Configuration

Account onboarding, setup, and configuration are done through Zoom, whereby Arctrieval's team guides you through the process of establishing your account, adding users, explaining and configuring system options, entering payment information, and reviewing the Customer Success Plan. Anyone who will be a system administrator for your Arctrieval account should attend the account configuration session. Once you are completely satisfied with the account configuration, the Customer Success and Training Plan fee is charged to your payment method.

## Arctrieval Overview Recording

Your staff will be provided a video link to a recorded webinar to watch at their convenience. The webinar explains the individual right of access methodology and provides an overview of Arctrieval's software. It is a great primer for staff who have not participated in an Arctrieval demonstration, and we strongly encourage the staff using Arctrieval to watch it prior to the first live training session.

## First Arctrieval Training Session

During the first training session, conducted through Zoom, our trainers will cover the following topics: Intake Forms, Adding Client Information, Supporting Client Documents, and Signature Best Practices. The training session usually lasts 45 minutes, with additional time for Q&A. It is recorded, and the recording is available to download for review.

At the end of the session, the team will have a “homework” assignment to obtain three to five client signatures on the Client Intake Form or Personal Representative Intake Form. The forms are used in the second live training session.

## Second Arctrieval Training Session

During the second training session, conducted through Zoom, our trainers build upon the materials from the first session and use the signed intake forms as we cover the following topics: Adding medical providers to Contacts, Issuing Individual Right of Access Requests, Request Activities, and Available resources. The training session usually lasts 45 minutes, has additional time for Q&A, is recorded, and the recording is available to download for review.

## Arctrieval Integration Training

Arctrieval integration training provides an overview of how Arctrieval and one of the many case management systems integrated with Arctrieval work together. The training session typically lasts 30 minutes, with additional time for Q&A. It is recorded, and the recording is available to download for review.

## Customer Success Checkpoints

During the first 120 days, Arctrieval’s Customer Success Team will check in with you regularly to see how things are going, answer any questions, schedule additional training as needed, and monitor your progress toward software mastery. We aim to ensure everyone is comfortable using Arctrieval and actively issuing requests.

## Unlimited Customer Service and Support

We know Arctrieval’s method and software differ from what you are accustomed to, and you will have questions and may need assistance along the way. We provide unlimited customer service and technical support. If you have a question or need help, just email [support@arctrieval.com](mailto:support@arctrieval.com). Our goal is to answer all emails within 1 to 2 business days. Let us know if you want to meet with someone live, and we will send you a link to schedule a live session over Zoom.

## Additional Resources and Training

Arctrieval maintains an expanding library of guides and self-paced videos available to all users at [www.arctrieval.com/support](http://www.arctrieval.com/support). The training program and hours outlined above are usually enough for the staff to master Arctrieval’s software. If additional training is required for your firm, Arctrieval tries to provide training at no extra cost. However, if multiple new staff members need training or the training grossly exceeds the included hours, additional training hours are available at a time and materials rate of \$99 per hour. We will, of course, notify you in advance of any potential charges.

## Agreement

I agree to the Customer Success Plan and Training Agreement as outlined above.

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Firm Name

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Signature

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Printed Name

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Date