

### 1. Archiving Clients and Requests—Quick Steps

- 1. Select the Client that you want to Archive.
- 2. Click the Activity button.
- 3. Select "Archive Client and Requests" from the dropdown menu.

A	Dashboa	rd							CLOSE	ACTIVITY		EDIT C	LIENT
*	Clients			Kevin J I	Fine					2			
	Record R	equ	ests	Phone:		(380) 55	5-1212						
	Contacts			Mobile:		(480) 14	18-0664						
	Matters	/	Activity								$\times$	88	
	Reports		Calact The Activity	Vou Wich To Dor	form: *							ay Histo	ry
	Forms		Add General N	lote to Client							1		Starting
	Settings		Add Contact to	o Client							L		DOS
0	My Profil		Email Online I	ntake Form f	or Electronic Sig	gnature					l	il -	10/09/2010
			Create Intake	Form PDF for	r Signature						L		
		3	Archive Client	and Request	s 🖑								10/09/2018
									OANOLL	ADDITOT			
				0130	Hospital, Medical Records	Billing	to 3rd Party	Canceleo	1				01/01/2019
				•									+
								Rows per page	20 👻	1 - 3 of 3	<	< 1	> >1

4. The following dialog box is displayed.Click the Archive Client button to continue.

Activity				
Select The Activity You Wish T Archive Client and Rec	Γο Perform: <b>*</b> J <b>uests</b>			•
You want to archive the fo	bllowing client and all their related r	ecord requests:		
Client Name:	Fine, Kevin			
Client DOB:	10/15/1967			
Note: All requests for the	client must be completed before ye	ou can archive the client.		
			CANCEL	4 ARCHIVE CLIENT

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### Archiving and Restoring Clients and Requests

5. The Confirm Client and Request Archive dialog box is displayed. Click the Confirm Archive button to continue

Confirm Client	and Request Archive	
You are about to archi Please confirm you wa	ve all the client and record request information in your account related for the client shown be ant to archive the information:	low.
Name:	Fine, Kevin	
DOB:	10/15/1967	
	CANCEL CONFIRM	ARCHIVE

6. The Client and Record Request Archive Confirmation dialog box is displayed. Click the Close button to continue using Arctrieval.

Client and Record Request Archive Confirmation	×
The client and all of their related record requests were successfully archived. You can access archived client and request information through Reports.	
CLC	DSE



All of the requests for the Client must have a Completed, Completed – No Records, or Canceled status. If there are any open requests for the Client, the Client cannot be archived.

If there are any open requests, the Archive Error dialog box is displayed. Complete or cancel any open requests, before archiving a client.

Archive Error	×
There was an error archiving the client and their related record requests.	
Please check that all requests for the client are completed or canceled.	
Clients with open requests cannot be archived.	
Please contact Arctrieval support for additional assistance.	
	CLOSE



### 2. View Archived Clients and Requests

After a Client and their associated requests are archived, the archived information is accessible through the Reports menu

as shown in the image. Click the Run button that

corresponds to the information you want to view.

$\equiv$ Arctrieval <sup>®</sup> Smith, 0	Gallagher & Spencer LLP	SIGN OUT @HELP
A Dashboard	Q Search	
Clients	Report Description	
Contacts	Clients - All Active and Archived	RUN
Matters	Clients - Archived	RUN
		_
Forms	Record Requests - All Active and Archived	RUN
My Profile	Record Requests - Archived	RUN
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# The Inactive Client list is displayed.

= Arctrieval Smith,	Gallagher &	Spencer LLP									SIGN OUT @HELP
A Dashboard	Q Searc	h					Clients -	Archive	ed	CL	EXPORT TO EXCEL
2 Clients	Archive Status	Name 🕇	Phone	Mobile	City	State	Date of Birth	SSN	Signature Uploaded	Patient ID Uploaded	Email
Record Requests	Client	Doe, John			City	ОК	01/01/1980	8989	Yes	Yes	janderson@arctrieval.com
Contacts	Inactive Client	Doe, John			Trevose	PA	01/01/1980	9876	Yes	Yes	janderson@arctrieval.com
Matters	Inactive Client	Doe, John			Columbia	SC	01/01/1980	9898	Yes	Yes	janderson@arctrieval.com
Reports	Inactive Client	Doe, John			Las Vegas	NV	01/01/1980	0012	Yes	No	janderson@arctrieval.com
Forms	Inactive Client	Doe, John			Torrance	CA	01/01/1980	1111	Yes	Yes	janderson@arctrieval.com
Settings	Inactive Client	Fine, Kevin	(380) 555- 1212	(480) 148- 0664	Scottsdale	Arizona	10/15/1967	4444	Yes	Yes	
e my Pronie	Inactive Client	Hancock, Aaron			Scottsdale	AZ	01/01/1980	8888	No	No	jvishney@arctrieval.com
	Inactive Client	Hancock, Alan			San Jose	CA	01/01/1980	8888	Yes	Yes	adam@pacificlawfirms.com
	Inactive Client	Hancock, Alan			Austin	тх	01/01/1980	7878	Yes	Yes	jvishney@arctrieval.com
	Inactive Client	Hancock, Alexander			Phoenix	AZ	01/01/1980	8999	Yes	Yes	jvishney@arctrieval.com
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### 3. Restoring Archived Clients and Requests

- 1. Click on the Report menu
- Click the Run button next to Clients-Archived in the report description list.

$\equiv$ <b>Arctrieval</b> <sup>*</sup> Smith, 0	SIGN OUT @HELP	
♠ Dashboard	Q Search	
Clients	Report Description	
Contacts	Clients - All Active and Archived	RUN
Matters	Clients - Archived	2 RUN
Forms	Record Requests - All Active and Archived	RUN
My Profile	Record Requests - Archived	RUN
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 Click on the Client you want to reactivate from the list. You can narrow down the list by entering the Client's name in the Search box.

$\equiv$ Arctrieval Smith, C	Gallagher &	Spencer LLP									SIGN OUT @HELP	
f Dashboard	Q Searc	h					Clients -	Archiv	ed	CL	OSE EXPORT TO EXCEL	
2 Clients	Archive Status	Name 🕇	Phone	Mobile	City	State	Date of Birth	SSN	Signature Uploaded	Patient ID Uploaded	Email	^
Record Requests	Client	Doe, John			City	ОК	01/01/1980	8989	Yes	Yes	janderson@arctrieval.com	
Contacts	Inactive Client	Doe, John			Trevose	PA	01/01/1980	9876	Yes	Yes	janderson@arctrieval.com	
Matters	Inactive Client	Doe, John			Columbia	SC	01/01/1980	9898	Yes	Yes	janderson@arctrieval.com	
Reports	Inactive Client	Doe, John			Las Vegas	NV	01/01/1980	0012	Yes	No	janderson@arctrieval.com	
Forms	Inactive Client	Doe, John			Torrance	CA	01/01/1980	1111	Yes	Yes	janderson@arctrieval.com	ł
Settings	Inactive Client	Fine, Kevin	(380) 555- 1212	(480) 148- 0664	Scottsdale	Arizona	10/15/1967	4444	Yes	Yes		
My Profile	Inactive Client	Hancock, Aaron	3		Scottsdale	AZ	01/01/1980	8888	No	No	jvishney@arctrieval.com	1
	Inactive Client	Hancock, Alan			San Jose	CA	01/01/1980	8888	Yes	Yes	adam@pacificlawfirms.com	1
	Inactive Client	Hancock, Alan			Austin	ТХ	01/01/1980	7878	Yes	Yes	jvishney@arctrieval.com	1
	Inactive Client	Hancock, Alexander			Phoenix	AZ	01/01/1980	8999	Yes	Yes	jvishney@arctrieval.com	,
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## Archiving and Restoring Clients and Requests



- 4. Click the Activity button.
- Select "Restore Client and Requests to Active Status" from the dropdown menu.

=		<b>al</b> Smith,	Gallagher &	& Spencer LL	Ρ				SIGN OUT	⑦HELP
A	Dashboard								CLOSE	ACTIVITY
*	Clients Record Re	Activity	Kevin J F	ine	-	-	-	-	×	4
8	Contacts Matters	Salast The Activit Add General	Note to Client	form: *						
	Repor 5	Restore Clier	nt and Request	ts to Active Stati	us 🖑					/ History
	Forms								4	y Starting d DOS
Θ	My Profile									10/09/20
	١.	_	0144	Medical	Medical	to sig Party		CANCEL	ADD NOTE	10/09/20
© 21	023 Arctrieval   Al	I Rights Reserved.	AAAA- 0130	Records Southwest Valley Hospital, Medical Records	Billing	Patient Directed to 3rd Party	Canceled			01/01/20

6. Click the Restore Client button.

Activity			×
Select The Activity You Wish Restore Client and Re	To Perform: * quests to Active Status		•
You want to restore the f	ollowing client and all their related record	d requests to an active status:	
Client Name:	Fine, Kevin		
Client DOB:	10/15/1967		
			6
		CANCEL	RESTORE CLIENT

7. The Client and Record Request Restore Confirmation dialog box is displayed. Click the Close button to

Client and Record Request Restore Confirmation	×
The client and all of their related record requests were successfully restored to an active status. You can access client and request information through Clients and Record Requests.	SE

continue using Arctrieval.