Automated Follow Up Correspondence System Timing and Contact Settings

Arctrieval

1. Overview

According to the schedule in the table below, the Arctrieval system automatically sends follow-up correspondence to Contacts based on the request type.

Correspondence Type	Patient Directed to 3rd Party	Patient to Self
Initial Request Document	Day 0	Day 0
Follow up	Day 3	Day 3
Due Date Reminder	Day 15	Not applicable
Past Due Notice **Notice of Potential HIPAA Violation**	Day 30	Not applicable
Final Notice **Notice of HIPAA Violation**	Day 37	Day 37

The default schedule consistently reminds all Contacts to provide protected health information within 30 calendar days to comply with the HIPAA Privacy Law. However, the approach may be too aggressive or be considered badgering by Contacts who abide by the rules without consistent reminders.

Arctrieval has options to adjust the follow-up correspondence schedule timing and determine whether or not specific follow-up notices are sent to a Contact.

2. Automated Follow-Up Correspondence Timing

Arctrieval Account Administrators may review the current Automated Follow-Up Correspondence Timing by clicking Settings in the left-hand menu and the Account tab in the sub-menu, as shown in the image.

Automated Follow Up Schedule
System Timing and Contact Settings

To adjust the Automated Follow-Up Correspondence Timing, click the Edit Account button to display the Edit Firm Account Information pop-up dialog box. Scroll down until you see the Automated Follow-Up Correspondence section, as shown in the image.

1. The Follow Up Day value may be between three and ten calendar days. The default value is three calendar days, meaning the Follow Up correspondence is sent on the 3rd day after the initial request was set.

2. The Due Date Reminder value may be set between fifteen and twenty calendar days and must be ten days after the Follow Up Day. If you increase the Follow Up to 6 or more, the Due Date Reminder Day will also increase. The default value is fifteen calendar days, meaning the Due Date Reminder correspondence is sent on the 15th day after the initial request was set.

3. The Past Due and Final Notice values are set in the system and cannot be altered.

> ⚠️ The Timing for the Follow Up and Due Date Reminder apply to all correspondence for all requests sent to all Contacts in the system.

3. Enabling or Disabling Follow-Up for a Contact

For Contacts who provide information promptly, sending all of the Follow-Up correspondence may be unnecessary. For example, a Chiropractic or Physical Therapy Office that works on a lien or you established a good working relationship may perceive the Automated Follow-up Correspondence as pushy or badgering. Arctrieval Users can

determine which Automated Follow-Up Correspondence is sent to a specific Contact.

Arctrieval Users may review the current Automated Follow-Up for a Contact by clicking on the Automated Follow-Up submenu shown in the image.

To adjust whether an Automated Follow-Up Correspondence is sent to a Contact, click the Edit Contact button to display the Edit Contact Information dialog box and click on the Automated Follow-Up submenu, as shown in the image.

The Correspondence may be Enabled or Disabled. The default status is Enabled, which means the correspondence is sent on the numerical day indicated after the initial request to the Contact.

The Automated Follow-Up statuses only apply to the specific Contact. Changing the Follow Up or Due Date Reminder status will only affect the current Contact.