

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 3 rd 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 lefthand menu and the Account tab in the sub-menu, as shown in the image.

≡ Arctrieval [®] Smith,	Gallagher & Spencer LL	P		SIGN OUT @HELP
1 Dashboard	< Users	Account Plan and Billin	g Disbursement Account	Document Types Matter Types
Clients				EDIT ACCOUNT
Record Requests	Firm Name:	Smith, Gallagher & Spencer LLP	Company Logo:	Smith,
Contacts	Address 1:	23233 N. Scottsdale Rd. Ste.113 - PMB 145		Gallagher & Spencer LLP
Matters	City:	Scottsdale	Account Creation Date:	01/17/2020
E Reports	State:	AZ	Account Activation Date:	01/17/2020
Forms	Zip:	85254	Default Time Zone:	(UTC-07:00) Arizona
🖸 Settings	Phone:	(480) 741-1111	Request Prepayment Limit:	\$15.00
😝 My Profile	Fax:	(909) 786-0131	Automated Follow-Up Corres	spondence Timing
	General Email:	info@arctrieval.com	Initial Request	Day 0
	Website:	www.arctrieval.com	Follow Up	Day 3
			Due Date Reminder	Day 15
			Past Due Notice	Day 30
			Final Notice	Day 37
			Timing is the number of cale request was created and first	
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Automated Follow Up Schedule System Timing and Contact Settings

Arctrieval

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.

> 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.

Edit Firm Account li	nformation			×		
Request Prepayment Limit: * \$15.00 The request prepayment limit n	nust be between \$1.00 and \$100	0.00.				
Automated Follow-Up Corr	espondence	Timi	ing			
Initial Request		Day	0			
Follow Up		Day	- 3 +			
Due Date Reminder		Day	- 15 +	F		
Past Due Notice		Day	30			
Final Notice		Day	37			
Timing is the number of calendar days from the date the request was created and first sent to the Contact. Any changes are applied to the automated follow-up correspondence schedule for all Contacts and Requests.						
		CA	SAVE	CHANGES		

- 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

■ Arctrieval Smith,	Gallagher & Spend	cer LLP			SIGN OUT @HELI	
1 Dashboard				CLOSE	ACTIVITY EDIT CONTACT SEND NEW REQUES	
🚉 Clients	Cave Creek Me	dical Center				
Record Requests	Physical Location Information:		Mailing Location	n Information:	Note:	
Contacts	Department: Med	Medical Records Department		Centralized ROI-Health	Make sure to send the billing requests to the billing	
Matters		Cave Creek Road e Creek, AZ 85266	Address:	Information Management 7000 Medical Center Drive	company.	
Reports		3) 333-2222	Address.	San Jose, CA 90025		
Forms			Phone:	(800) 255-6000		
Settings			Fax:	(909) 786-0131		
My Profile			Email:	HIMROI@m-c-unlimited.com		
O My Florine	Record Requests	History	Contact Details	Automated Follow Up		
	Document		Timin	9	Automated Follow-Up	
	Initial Document		Day	0	Enabled	
	Follow Up		Day	3	Enabled	
	Due Date Reminder		Day	15	Enabled	
	Past Due Notice		Day	30	Enabled	
	Final Notice		Day	37	Enabled	
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Automated Follow Up Schedule System Timing and Contact Settings



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.

Edit Contac	Information				×	
Organization Name: Cave Creek Med						
^{Type:} Hospital					Ŧ	
Physical Addres	s Mailing Address	Au	tomated Follow-Up	Note		
Document	т	ming	Automated F	ollow-Up		
Initial Docume	nt D	ay O	Enable	ed		
Follow Up	D	ay 4	Enable	ed 🔵 Disabled		
Due Date Rem	inder D	ay 15	Enable	ed 🔵 Disabled		
Past Due Noti	ce D	ay 30	Enable	ed 🔵 Disabled		
Final Notice	D	ay 37	Enable	ed 🔘 Disabled 🗡		
Timing is the number of calendar days from the date the request was created and first sent to the Contact.						
				CANCEL	SAVE CHANGES	



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.