

1. Background

Verifying the identity of an individual or their personal representative is a critical step in the record retrieval process. Healthcare providers will not release protected health information to anyone who does not demonstrate the right to access the information. A signature is a critical element used by healthcare providers to verify the identity of an individual or their personal representative.



We cannot stress enough how important it is to obtain a clear and accurate signature from your client or their personal representative on the Arctrieval Intake Form.

Obtaining the client's or their personal representative's signature on the Arctrieval Intake Form is a required step for the individual right of access method and using Arctrieval's software. The signature on the Intake Form gives consent to the law firm and Arctrieval to use the individual's, and as needed the personal representative's, personally identifiable information (PII), signature, and government issued photo identification to request, manage, and retrieve sensitive records on their behalf.

Once signed, the Arctrieval Intake Form is added to the Client's Arctrieval record. The Arctrieval software extracts the client's or personal representative's signature from the form and remains in the client's record to use for all record requests. If you need to change or update the signature on a request that was issued, you must get a new signature, cancel any open requests, and issue a new request. After the signature is applied to the individual right of access document, it cannot be modified in any way.



The Arctrieval Intake Form is not a HIPAA compliant document and should never be attached to any request or correspondence sent to a healthcare provider. It is only for Arctrieval's internal use.

Arctrieval provides various options to obtain a signature on the Client Intake Form, including:

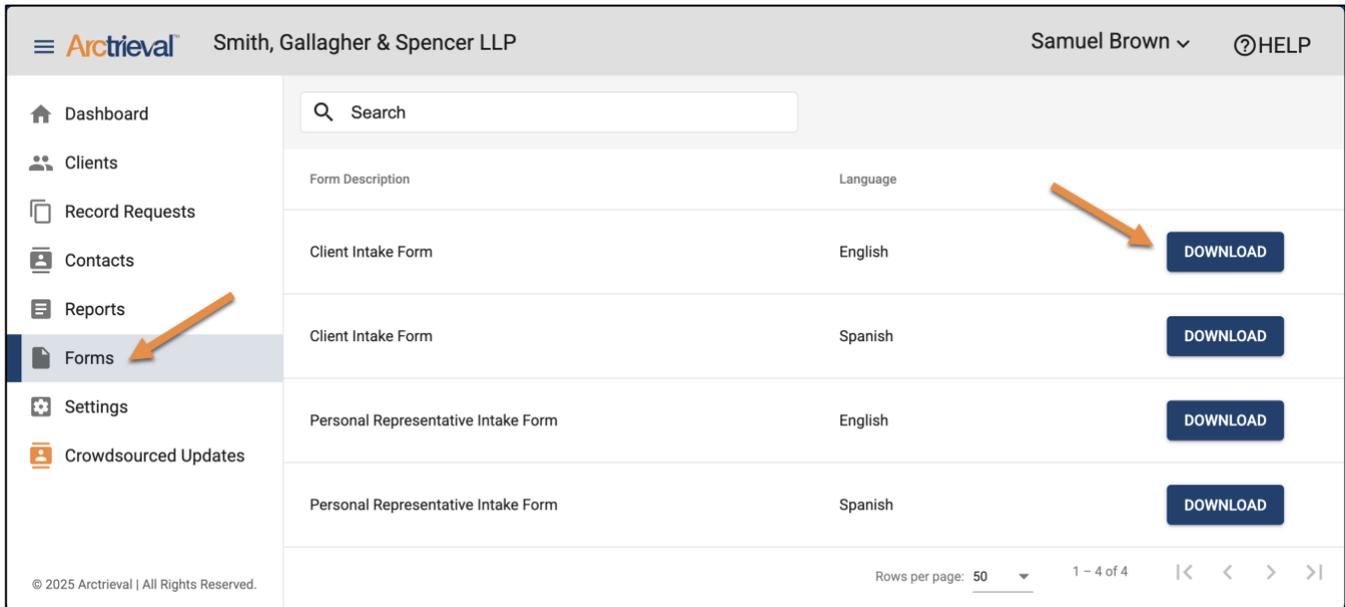
1. A Physical or Wet Signature
2. Digital signature image through a Third-Party eSignature Platform,
3. Digital signature image through Email or SMS.

Each option is discussed in detail below.

2. Physical or Wet Signatures

A physical or wet signature is a good option for clients uncomfortable with technology. It ensures that the signature on the form is optimized for the request process and meets all requirements.

There are two different intake forms, depending on whether the client or their personal representative will sign the form. Forms are accessed by clicking Forms in the left-hand menu and then clicking the Download button next to the desired form, as shown in the image.



After printing out the form, here are two ways to obtain the signature:

1. Have the client or personal representative sign the form when you meet with them. Ideally, the form should be signed while they sign your retainer and representation agreement.
2. Mail the form to the client or personal representative with a prepaid return envelope. The prepaid envelope makes it easy for the client to return the signed form to you.

Alternatively, you can email the Arctrieval Intake Form to the client or personal representative, ask them to print it out and mail it back to you.

2.2. Personal Representative Intake Form

If the patient’s personal representative is pursuing the claim, case, or action, the personal representative will sign the Personal Representative Intake Form as shown in the image.

1. The personal representative will write the patient’s name in the space indicated.
2. The personal representative will write their full name in the space indicated.
3. The personal representative will enter the date they signed the document in the space indicated.
4. The personal representative will sign inside the indicated box as large and neatly as possible.

Best practices and tips:

1. Have the personal representative use a black pen. A fine Sharpie is ideal.
2. The signature should be large without touching the box’s edges.

Personal Representative Intake Form

Smith, Gallagher & Spencer LLP uses Arctrieval’s service to request and manage documents, records and evidence related to your case or claim. I am the personal representative for ("Patient"), I understand, agree to and authorize the following:

1. Arctrieval’s Privacy Policy and Terms of Use which may be reviewed at www.Arctrieval.com.
2. Smith, Gallagher & Spencer LLP and Arctrieval Inc. to use Patient’s personally identifiable information, Patient’s government-issued identification, my personally identifiable information, my government-issued identification and a digital image of my signature to obtain any and all information related to the case or claim for Patient.
3. Smith, Gallagher & Spencer LLP and Arctrieval Inc. to affix a digital image of my signature to documents necessary to obtain information related to the case or claim for Patient with the same authority as if I signed the document myself.
4. Information related to the case or claim may include, but is not limited to, protected health information, medical records, billing records, medical images, accident reports, repair estimates, witness statements, insurance claim information, etc.
5. My authorization and this agreement are voluntary, and I may refuse to sign this form.
6. I may revoke this agreement and my authorization at any time, in writing by submitting a written revocation to:

Smith, Gallagher & Spencer LLP
 34 West Main Street
 Disneyland, FL 85000
7. My revocation will take effect upon receipt, except where others already acted in reliance upon this agreement and my authorization.
8. Unless, I revoke this agreement and my authorization earlier, it will expire 24 months from the date shown below.

Personal Rep’s Name: Today’s Date:

Personal Representative Signature:

Please sign clearly and as large as possible in the box at the right if you agree to the terms herein.

Make sure your signature does not touch or go outside the box or it will affect the image capture.

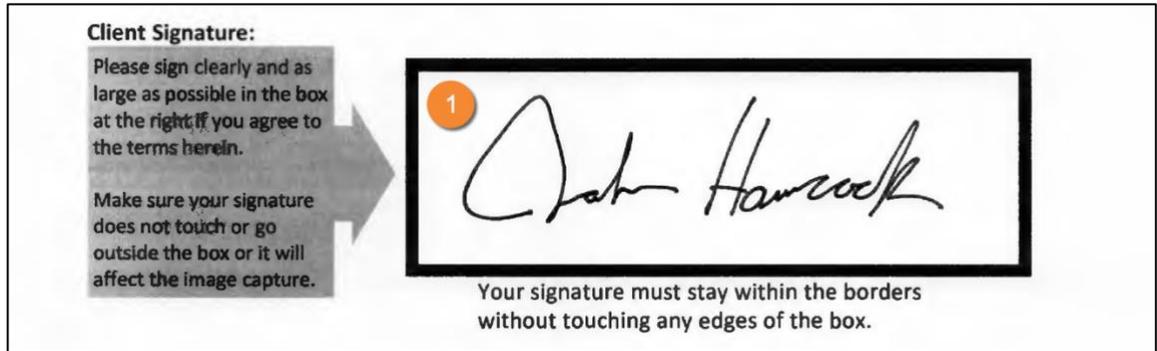
4

Your signature must stay within the borders without touching any edges of the box.

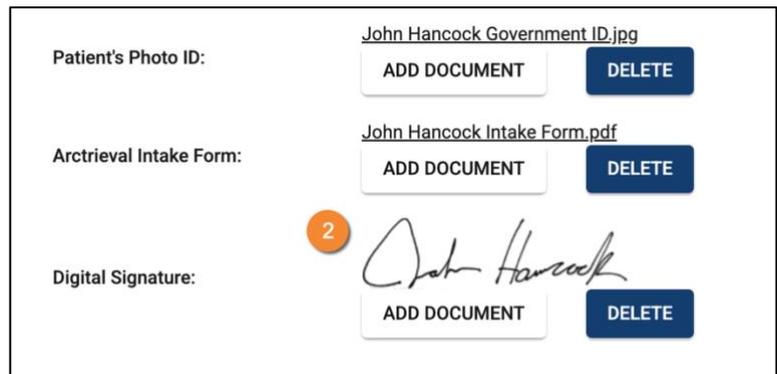
Arctrieval, Inc. Confidentiality Notice: This communication, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution of this information is prohibited. If this was sent to you in error, please notify the sender and destroy all copies of the original message.

2.3. Ideal Signature

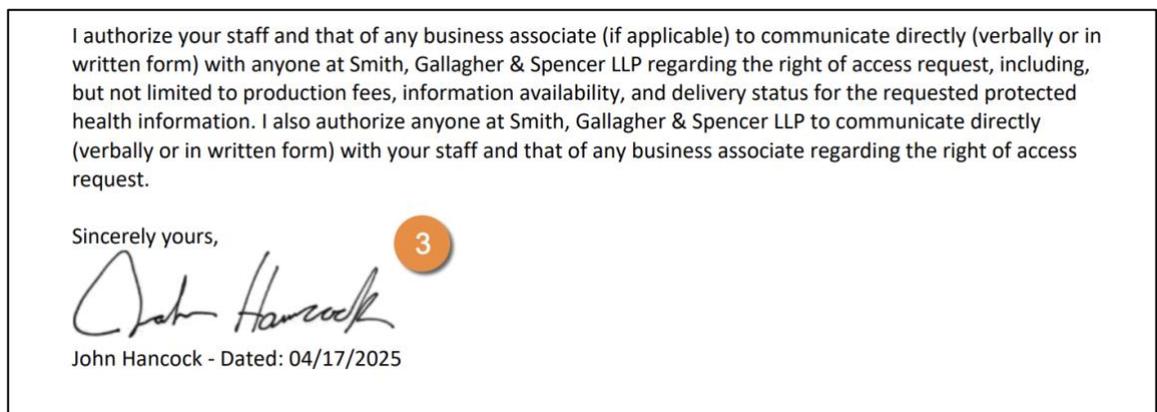
Whether wet signed or through a digital capture option, the ideal signature is dark, clear and nearly fills the signature box as shown in the image—labeled 1.



When the intake form is uploaded to Arctrieval, the system extracts the signature from the document and displays it in the Client Details, as shown in the image—labeled 2.



The signature should be clean and clear because it will be used on the Individual Right of Access request sent to the healthcare provider. The better the signature, the better the results you will see requesting records—labeled 3.



3. Third-Party eSignature Platform

You may use your firm's third-party eSignature platform (e.g., DocuSign, Adobe Sign, PandaDoc, Vinesign) to obtain a digital image of the signature on the Arctrieval Intake Form.

The signature must be drawn for all digitally signed Arctrieval Intake Forms, whether collected through your firm's third-party eSignature platform or Arctrieval's built-in Digital Signature tool.

Typed signatures, pre-filled name text, stamped, or computer-generated signatures are not accepted. Providers will reject these digital signatures. If any of these are present on a signed form, you must resend the document and obtain a properly drawn signature.

3.1. Third-Party eSignature

The client or personal representative must use a mouse, stylus, or touchscreen to draw their signature on the form.

The quality of the signature on the Arctrieval Intake Form plays a critical role in successful image

extraction. A clear, well-contrasted signature ensures the system can correctly process and extract the image. Scanned forms must be free from distortions, including shadows, blur, or black scan lines along the page edges.

Client's Printed Name: John Hancock Today's Date: 4/17/2025

Client Signature:
Please sign clearly and as large as possible within the lines in the area to the right.



Your signature must stay within the borders without touching any edges of the box.

3.2. Unusable Third-Party eSignature

Typed signatures, pre-filled name text, stamped, or computer-generated signatures are not accepted. Providers will reject these digital signatures. If any of these are present on a signed form, you must resend the document and obtain a properly drawn signature.

Client's Printed Name: John Hancock Today's Date: 4/17/2025

Client Signature:
Please sign clearly and as large as possible within the lines in the area to the right.



Your signature must stay within the borders without touching any edges of the box.

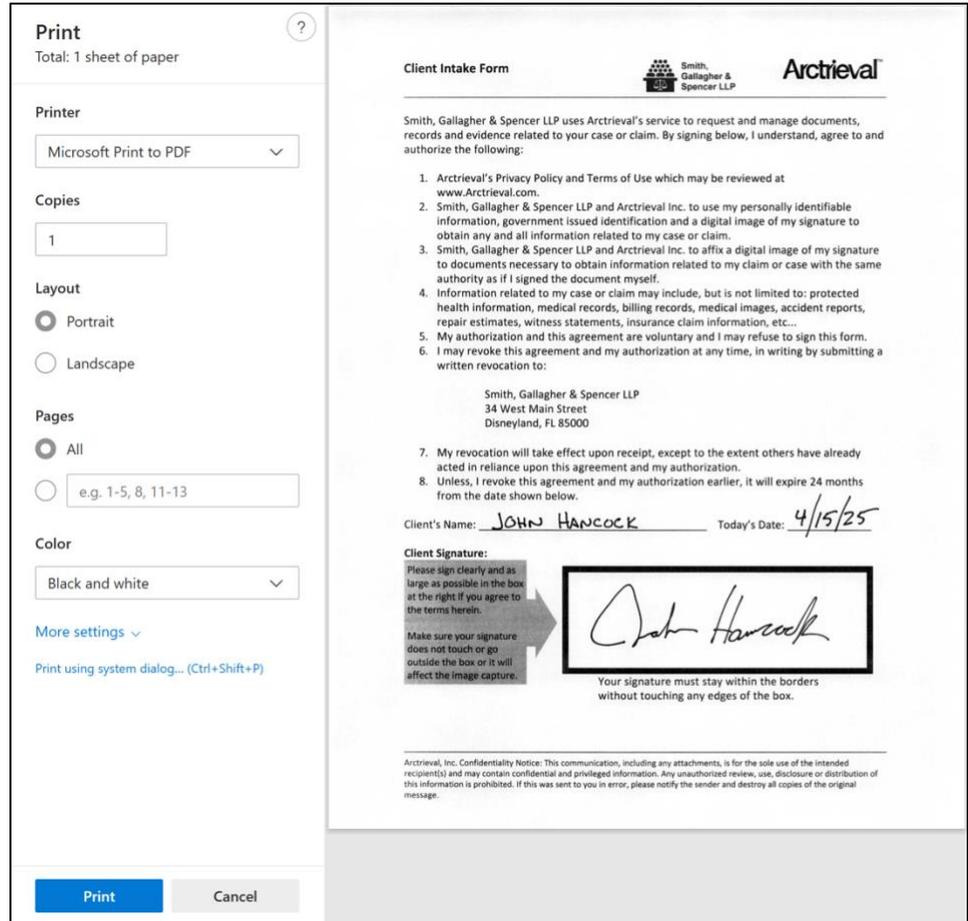
Intake Form Signatures Best Practices



3.3. Removing Security from PDF file

Some eSignature providers add security to the PDF file that does not allow Arctrieval to properly extract the signature from the document when it is uploaded. Follow these steps to remove the security.

1. Print the File to PDF
2. Open the file in your PDF viewer.
3. Click the Printer icon.
4. Select Microsoft Print to PDF as the printer.
5. Print only the signature page and save the new file.
6. Upload the simplified PDF file to Arctrieval.



3.4. Removing Additional Pages

The uploaded intake form can only be one page long. Some eSignature providers add pages with security information to the file. Follow these steps to remove any additional pages.

1. Open the file in Adobe Acrobat or other PDF editor.
2. Use the Page Organizer to extract the page with the signature.
3. Save the extracted page as a new PDF file.
4. Upload the new PDF file to Arctrieval.

4. Arctrieval Digital Signature Capture Options

Arctrieval enables the Client or Personal Representative to sign the required Intake Form on their smartphone or another touch-enabled device. Research shows that most texts are read within three minutes of being sent, with an average response time of ninety seconds. Therefore, most people should read the text, sign the required Intake Form, and take a picture of their photo ID within minutes.

To learn more about this option, refer to the Texting Online Intake Form to Client guide on the Arctrieval support webpage.

5. Common Signature Issues

5.1. Border or Scan Lines

Suppose the Intake Form has a border or scan line around the edges of the document. In that case, Arctrieval cannot properly extract the signature, and a thumbnail of the document will appear instead of the actual signature.

You must remove the black border or scan lines from the document before uploading it to Arctrieval.

The easiest way to do this is by using Adobe Acrobat or other PDF editors to crop the page.

Client Intake Form

Smith, Gallagher & Spencer LLP

Arctrieval™

Smith, Gallagher & Spencer LLP uses Arctrieval's service to request and manage documents, records and evidence related to your case or claim. By signing below, I understand, agree to and authorize the following:

1. Arctrieval's Privacy Policy and Terms of Use which may be reviewed at www.Arctrieval.com.
2. Smith, Gallagher & Spencer LLP and Arctrieval Inc. to use my personally identifiable information, government issued identification and a digital image of my signature to obtain any and all information related to my case or claim.
3. Smith, Gallagher & Spencer LLP and Arctrieval Inc. to affix a digital image of my signature to documents necessary to obtain information related to my claim or case.
4. Information related to my case or claim may include, but is not limited to: protected health information, medical records, billing records, medical images, accident reports, repair estimates, witness statements, insurance claim information, etc...
5. My authorization and this agreement are voluntary and I may refuse to sign this form.
6. I may revoke this agreement and my authorization at any time, in writing by submitting a written revocation to:

Smith, Gallagher & Spencer LLP
Address Line 1 Data
Address Line 2 Data
City Data, State 85000

Arctrieval Inc.
23233 N. Pima Road, Suite 113 PMB 145
Scottsdale, AZ 85262

7. My revocation will take effect upon receipt, except to the extent others have already acted in reliance upon this agreement and my authorization.
8. Unless, I revoke this agreement and my authorization earlier, it will expire 24 months from the date shown below.

Client's Printed Name: John Hancock Today's Date: 4/7/2022

Client Signature:
Please sign clearly and as large as possible within the lines in the area to the right.

John Hancock

Your signature must stay within the borders without touching any edges of the box.

Arctrieval, Inc. Confidentiality Notice: This communication, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution of this information is prohibited. If this was sent to you in error, please notify the sender and destroy all copies of the original message.

Intake Form Signatures Best Practices

Arctrieval Intake Form: Client Intake Form with Black Border.pdf

Digital Signature:

Browse DELETE

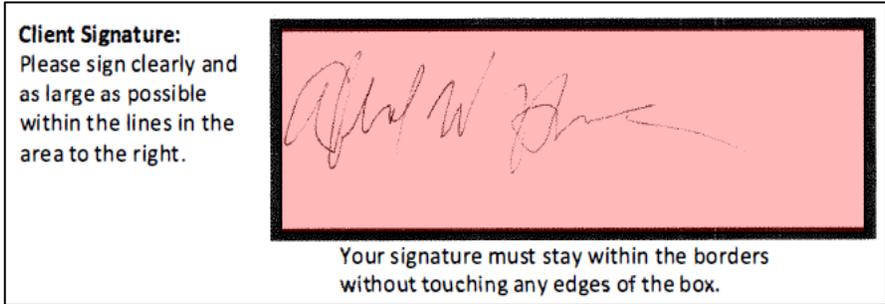
Browse DELETE

Intake Form Signatures Best Practices

5.2. Faint or Light Signature

If the signature is faint, it will lead to a poor or pixelated image in Arctrieval and lead to rejection by providers.

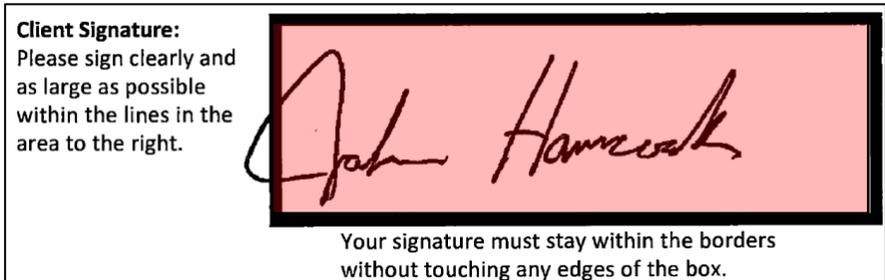
If the signature is too light or unclear, the client must resign the form. Alternatively, you can use Arctrieval's digital signature capture option to send the client a link to sign the document on their smartphone.



5.3. Signature Outside Box

The signature must be correctly positioned and sized within the designated signature box.

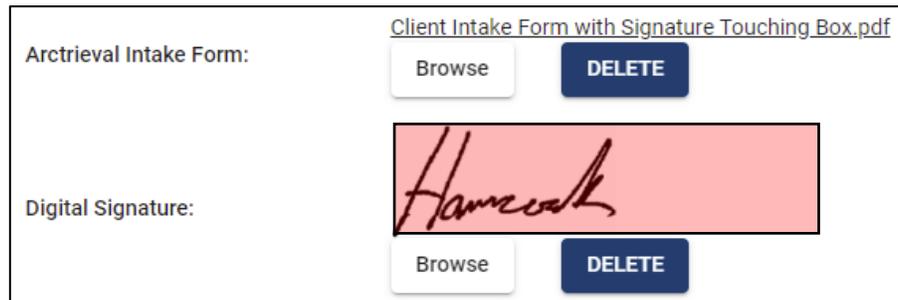
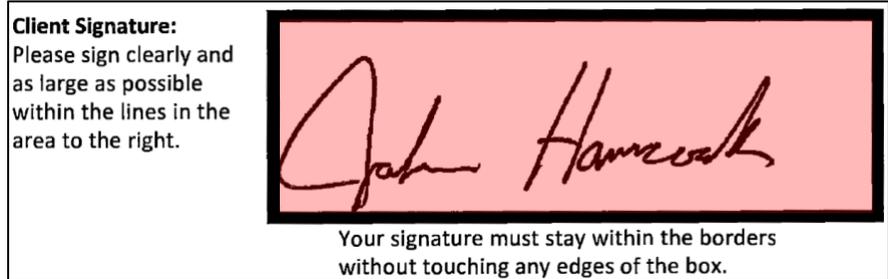
Signatures crossing the signature box's black border will prevent Arctrieval from extracting the image. This happens because the system cannot determine the edge of the signature, resulting in cropping errors or failure to capture the signature entirely.



5.4. Signature Touching Box

The signature must be correctly positioned and sized within the designated signature box.

Signatures touching the signature box's black border will prevent Arctrieval from extracting the image. This happens because the system cannot determine the edge of the signature, resulting in cropping errors or failure to capture the signature entirely.



5.5. Signature Too Small

Signatures that are too small often create a different problem.

When a client signs using tiny handwriting, the resulting image may not register correctly within the system. The signature can appear blurry, pixelated, or unrecognizable when extracted. This often happens when a client uses a pen or stylus with limited visibility or does not realize the need to fill the signature box adequately.

