

1. Overview

In Arctrieval, the firm’s Arctrieval account settings are managed by users with administrator privileges. There are two user levels with the necessary access: Administrator and Administrator-User.

Users with administrative privileges are responsible for configuring and maintaining the firm’s Arctrieval account settings using the Account Tab in the Settings menu. This guide explains how to access and use the Account Tab effectively to ensure account information remains accurate and aligned with firm policies.

2. User Roles & Permissions

Feature / Setting	Administrator	Administrator-User	User
Dashboard	✔ Yes	✔ Yes	✔ Yes
Clients	✘ No	✔ Yes	✔ Yes
Record Requests	✘ No	✔ Yes	✔ Yes
Contacts	✘ No	✔ Yes	✔ Yes
Reports	✘ No	✔ Yes	✔ Yes
Forms	✔ Yes	✔ Yes	✘ No
Settings	✔ Yes	✔ Yes	✘ No

3. Accessing the Account Tab

1. Click on Settings in the left-hand menu
2. Navigate to the Account tab at the top of the screen.

4. The Edit Account Button

The Edit Account button is located in the top-right corner of the Account Tab. Clicking the Edit Account button lets you update your firm’s information and various account-wide preferences. Each setting can be edited individually and define how your firm’s Arctrieval account functions, appears, and communicates with providers. The following descriptions explain each setting, its purpose, and how it may affect your daily workflow.

Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Developer	Integrations
Firm Name: Smith, Gallagher & Spencer LLP		Company Logo:		Account Creation Date: 01/17/2020			
Address 1: 1234 Main Street		Account Activation Date: 01/17/2020		Default Time Zone: (UTC-07:00) Arizona			
Address 2: Suite 89		Request Prepayment Limit: \$15.00		Inactivity Timer: 120 minutes			
City: Scottsdale		Include Prepayment With Request: Enabled		Crowdsourced Contact Database Access: Enabled			
State: AZ		Automated Follow-Up Correspondence		Timing			
Zip: 85000		Initial Request		Day 0			
Phone: (480) 234-5678		Follow Up		Day 4			
Fax: (480) 765-4321		Due Date Reminder		Day 15			
General Email: info@smithgallagherspencer.com		Past Due Notice		Day 30			
Website: www.smithgallagherspencer.com		Final Notice		Day 37			
<small>Timing is the number of calendar days from the date the request was created and first sent to the Contact.</small>							

4.1. Firm Information

The fields define how your firm is identified within Arctrieval and how you appear in the letterhead of outgoing correspondence.

1. Firm Name. This is the official name of your law firm or organization. It appears in all outbound communications, such as request letters and follow-up notices. If your firm undergoes a rebranding or legal name change, it’s important to update this field so that your identity is accurately reflected in every provider communication.
2. Firm Address. This is the physical address for your main office or headquarters. It is the default information included in every provider-facing documentation generated by Arctrieval, which helps providers verify the origin of the request.



If you have satellite or remote offices in another city or state, there is an option to set up an alternate address, fax number and email for users located in the satellite or remote offices in the User configuration options. Setting up an Alternate address is covered in the Administrator Guide Users Settings.

3. Phone and Fax Numbers. These fields store your firm's primary phone number and fax number. Many providers will send medical or billing records via fax when it is just a few pages, and it is faster for them than creating an electronic file.

4. General Email. This is the default email address listed in your account's general information. It appears in all outgoing communications and shows the provider where to send their response, which includes electronic records.

Edit Firm Account Information

1 Firm Name: *
Smith, Gallagher & Spencer LLP

2 Address 1: *
1234 Main Street

Address 2:
Suite 89

City: * State: * Zip: *
Scottsdale AZ 85000

Phone: *
(480) 234-5678

3 Fax:
(480) 765-4321

4 General Email:
info@smithgallagherspencer.com

5 Website:
www.smithgallagherspencer.com

5. Website. This field lets you list your firm's official website. It is part of the client digital signature capture process. After the client signs Arctrieval's online intake form and uploads their photo ID, the system redirects them to your homepage to strengthen the connection with your firm.

4.2. Account Preferences

These settings determine how your Arctrieval account functions and behaves for all users in the firm.

6. Default Time Zone. This setting specifies the time zone used throughout your Arctrieval account for all timestamps, including request creation dates, follow-up schedules, and history logs. Setting this correctly helps prevent confusion around deadlines, especially when working with providers or clients in different states.
7. Default Rows Displayed. This setting controls how many rows appear in a data table when viewing lists of clients, record requests, or contacts. Increasing the row count lets you see more records at once without having to click through multiple pages. This is especially useful for firms that handle a large volume of cases and want a broader overview on one screen.
8. Inactivity Timer. The inactivity timer determines how long the system waits before automatically logging out a user due to inactivity. This feature enhances security by protecting sensitive health information. If no clicks or actions occur within the set time, the session ends, and the user is logged out.
9. Upload Logo. This feature allows your firm to upload a custom logo. The uploaded logo appears in the header of requests, letters, and other generated documents. This enhances your firm's branding and makes correspondence look more professional and personalized.

10. Request Prepayment Limit. Some providers require prepayment before releasing records. When this feature is enabled, users will see a checkbox when creating a new request that allows them to include a prepayment amount. You can also set the maximum prepayment limit that your users are allowed to enter.

Edit Firm Account Information

6 Default Time Zone: * (UTC-07:00) Arizona

7 Default Rows Displayed per Page: None

8 Inactivity Timer: * 120 minutes
Between 15 and 120 minutes

9 Upload Logo:
Choose a File...
Select image file in PNG, JPG, JPEG or HEIC file format to upload.

Request Prepayment Limit: * \$15.00

Include Prepayment with Request: Enabled **DISABLE**

The request prepayment limit must be between \$1.00 and \$100.00.

In states like California, for example, many providers require a \$15 check to accompany record requests to cover the search and retrieval fee. By enabling this option, your users can include a prepayment using a single-use Visa card with their request. The payment amount is chosen during the Send New Request process, as shown in the image. If the option is disabled, users won't be able to see it.

Send New Request

Include Prepayment with Request:

Enter Prepayment Amount: * \$15.00

Arctrieval Transaction Fee: \$1.80

Disbursement Account Charge: \$16.80

Smith, Gallagher & Spencer LLP Arctrieval administrator set prepayment amount between \$1.00 and \$15.00.

Send the request to the contact using: *
 Email (Automated) Fax (Automated) US Mail (Automated)
 US Mail (Manual) Other-PDF File for Upload (Manual)

Link to Filevine Project

CANCEL **SAVE AS DRAFT** **PREVIEW REQUEST** **SEND REQUEST**

4.3. Automated Follow-Up Correspondence Timing

This setting, indicated by 11 in the image, allows administrators to set the timing for when automated follow-up messages are sent to providers after a request is initiated. These follow-ups remind providers to respond and help keep your requests on track.

You can specify the number of calendar days from the request date for both the Follow-Up message and the Due Date Reminder.

For example, a firm may choose to send the first follow-up after 5 days and the due date reminder after 12 days from the initial request date. Adjusting these values ensures the timing reflects your internal workflow and provider response patterns.

Automated Follow-Up Correspondence		Timing
Initial Request	Day	0
Follow Up	Day	- 4 +
Due Date Reminder	Day	- 15 +
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.

Crowdsourced Contact Database Access: Enabled DISABLE

CANCEL SAVE CHANGES



Through the Edit Contact functionality, you can determine what follow-up correspondence is sent to a provider. For instance, if a Chiropractor is treating your client, working on lien, and is very good about sending records, then you should disable the Follow Up and Due Data Reminder for that specific Chiropractor. There is no need for aggressive follow-up correspondence.

4.4. Crowdsourced Contact Database Access

This option, indicated by 12 in the image above, provides your firm access to Arctrieval’s crowd-sourced contact database, which compiles provider contact records shared by other users who have opted in. When adding a new contact, you can search this database using the provider’s name and state. If a match is found, Arctrieval will display available details such as phone and fax numbers, email, department, address, and the total number of completed requests from other firms.

When you click on the Add Contact button from the Contact Overview table, one of the options is Search for Contact in Arctrieval Crowdsourced Database as shown in the image.

Add New Contact [X]

Select how you want to add the Contact Information:

- Enter the information
- Search for Contact information in National Provider Identifier Database
- Search for Contact in Arctrieval Crowdsourced Database
- Search for Contact (Medical Provider) in Filevine Address Book

[CANCEL] [NEXT]

Selecting this option will display the Add New Contact – Search in Arctrieval Crowdsourced Database, as shown in the image.

Add New Contact - Search in Arctrieval Crowdsourced Database [X]

Organization Name:*
Test General Hospital

Department:
Medical Records Department

City: Scottsdale State:* Arizona

[CANCEL] [BACK] [CLEAR] [SEARCH]

This feature saves time by helping you find reliable contact information used by another firm to successfully obtain records from a specific provider.

4.5. Saving Changes

After updating your firm’s account details or preferences, click the Save Changes button. This applies your updates across the account. Be sure to double-check your entries before saving, as changes take effect immediately.

5. When to Use the Account Tab

The Account Tab should be used whenever your firm needs to update administrative information or modify how your Arctrieval account functions. Administrators should regularly review the settings in this section to ensure that firm details are correct, communication preferences match current needs, and system performance supports efficient workflows.

Here are some common situations when you should update your account settings:

- **Your firm has moved or changed its contact information.** If your firm relocates or updates its mailing address, phone, or fax numbers, it's important to update these details in the Account Tab. This helps keep your account information accurate and prevents confusion when other team members view your firm's details.
- **You want to upload or replace your firm logo.** When your firm updates its branding or adopts a new logo, uploading the latest version ensures it appears on system-generated correspondence such as cover letters and follow-up notices. This helps keep your communication professional and consistent.
- **Your general email has been updated.** The General Email field appears on all outgoing requests and should always display a current, relevant email address for reference and internal use.
- **Your website URL changed.** If your firm's website URL has changed, you can update it in the Account Tab. Keeping this field current ensures that account details remain accurate and reflective of your firm's online presence.
- **You need to adjust the follow-up schedule to match internal practices.** Arctrieval's automated follow-up settings determine how quickly reminders are sent to providers. If your firm introduces new policies about provider outreach, you can update the timing settings in the Account Tab to reflect the new schedule across all requests.
- **You want to enable or disable access to the Crowdsourced Contact Database.** By enabling the Crowdsourced Contact Database, your team can search for existing provider contact records that have been previously used by other Arctrieval users. This can save time when adding new contacts and reduce the chance of errors caused by incorrect fax numbers, addresses, or outdated emails.