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.

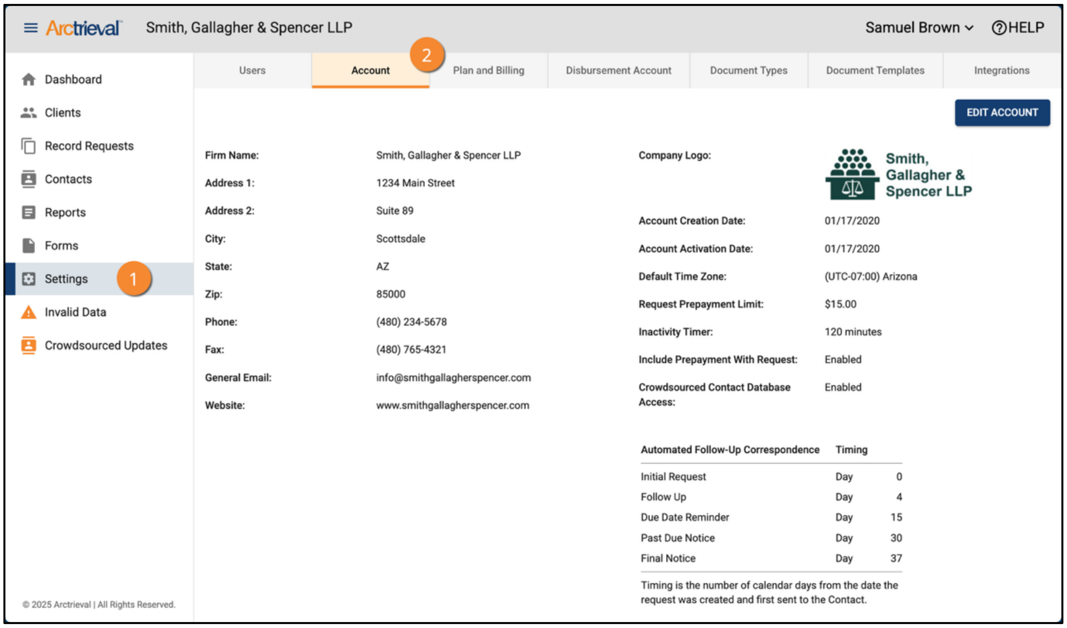
2. User Roles & Permissions

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
Requires Paid License	❌ No	✅ Yes	✅ Yes

⚠ Only users with Administrator or Administrator-User roles will see the settings tab described below. If you cannot access it, you may need to ask an existing Administrator to update your user role.

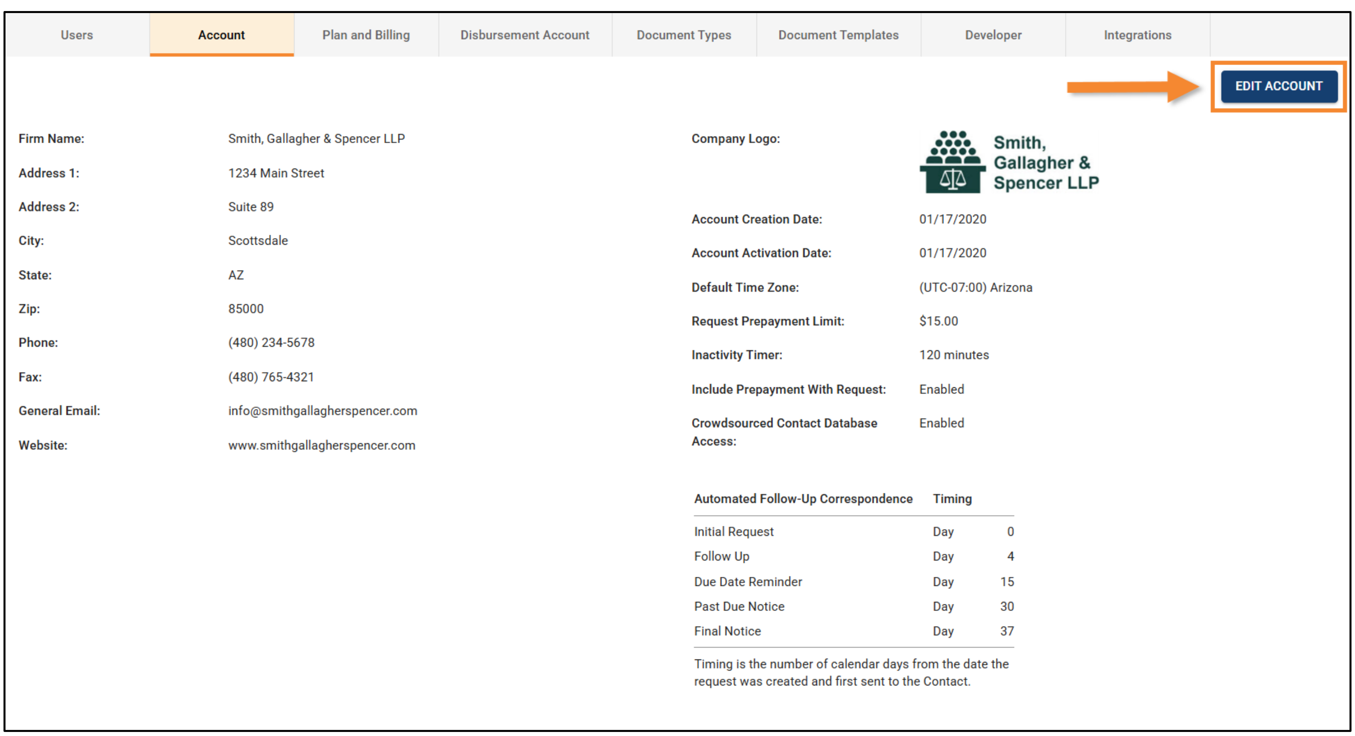
3. Accessing the Account Tab

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.



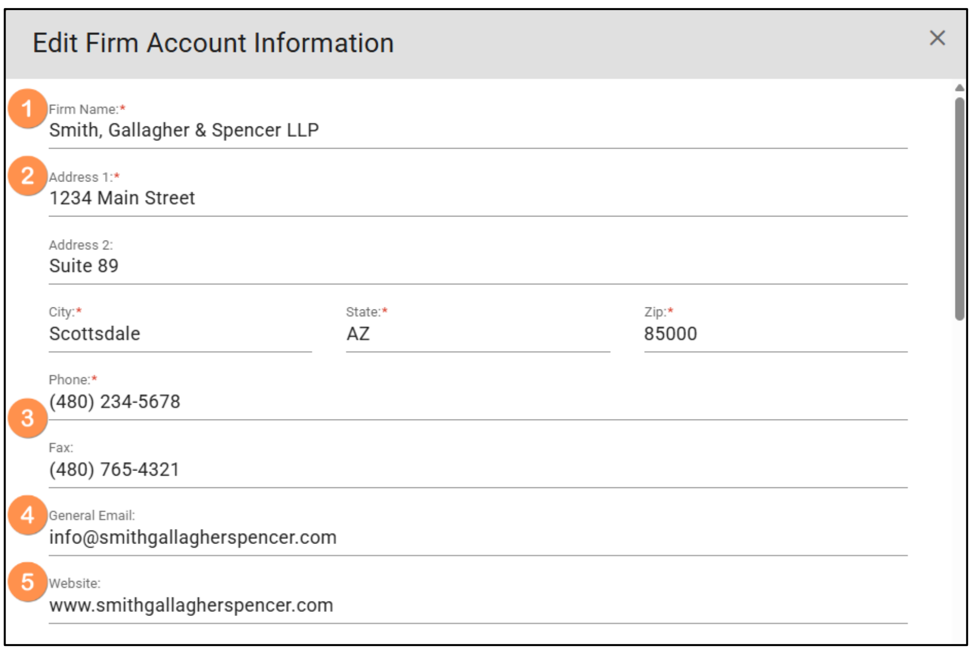
4.1. Firm Information

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.

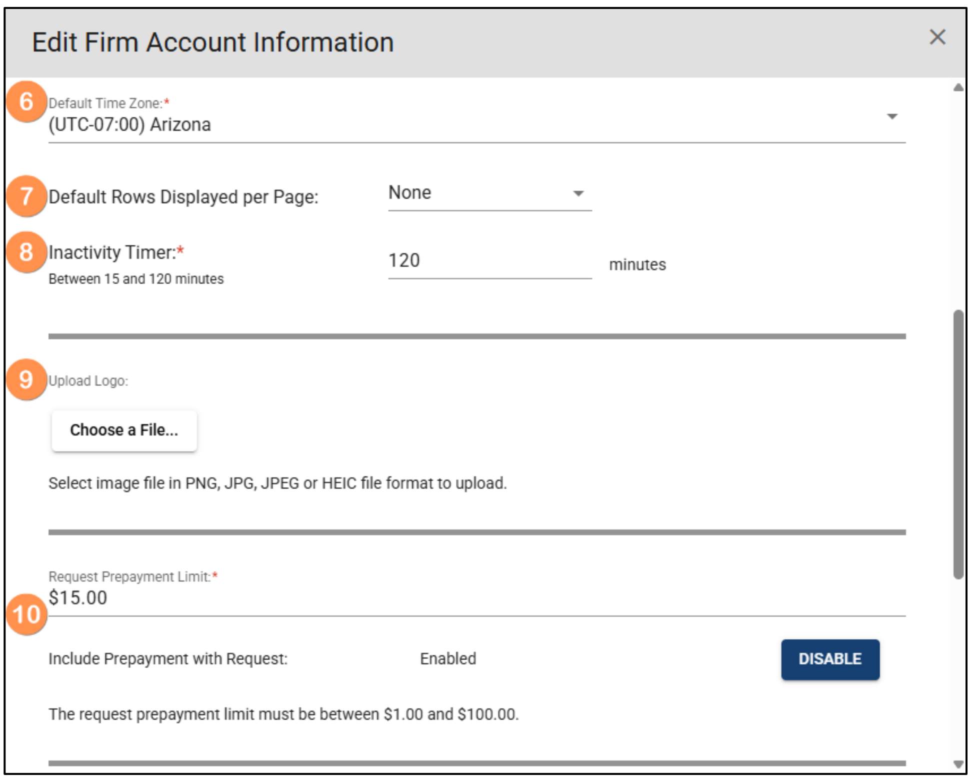
3. Phone and Fax Numbers. These fields store your firm's primary phone number and fax number. Many providers will send medical or billing records via fax when it is just a few pages, and it is faster for them than creating an electronic file.
4. General Email. This is the default email address listed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



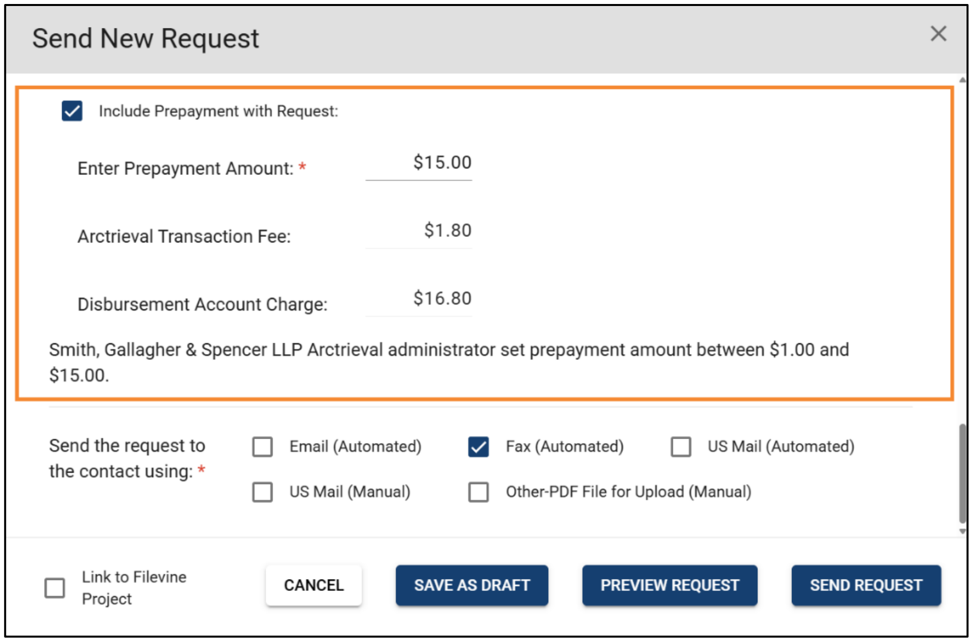
4.2. Account Preferences

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.



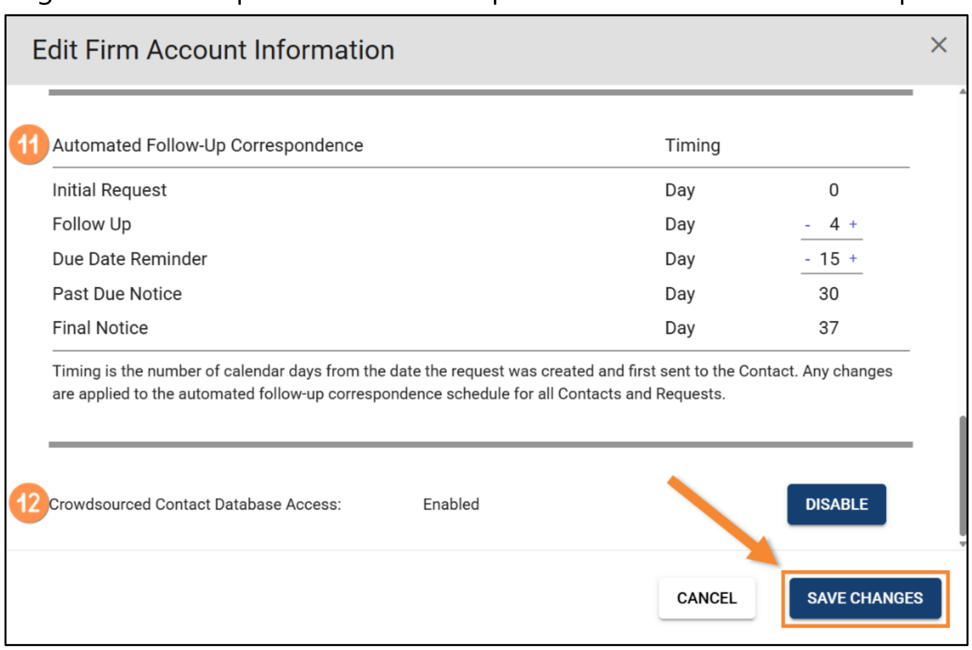
In states like California, for example, many providers require a $15 check to accompany record requests to cover the search and retrieval fee. By enabling this option, your users can include a prepayment using a single-use Visa card with their request. The payment amount is chosen during the Send New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



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.

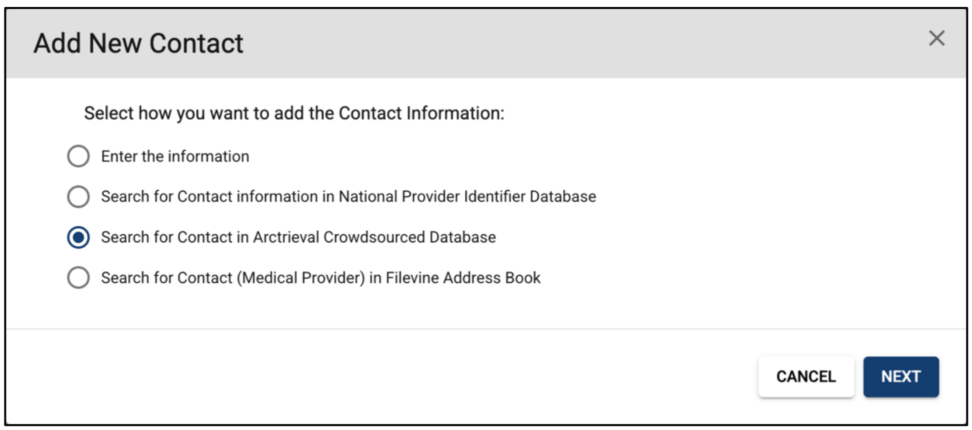
For example, a firm may choose to send the first follow-up after 5 days and the due date reminder after 12 days from the initial request date. Adjusting these values ensures the timing reflects your internal workflow and provider response patterns.



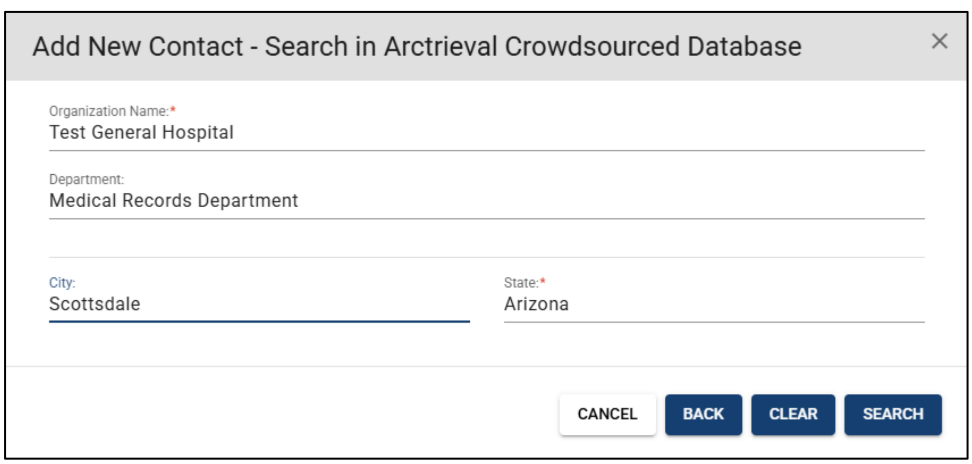
Through the Edit Contact functionality, you can determine what follow-up correspondence is sent to a provider. For instance, if a Chiropractor is treating your client, working on lien, and is very good about sending records, then you should disable the Follow Up and Due Data Reminder for that specific 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.



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

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.