1. Overview

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

Users with administrative access are responsible for creating, maintaining, and removing the users through the Users Tab in the Settings menu. This guide explains how to access and use the Users Tab effectively, helping administrators keep user information up to date and ensure that each team member has the correct permissions according to their role.

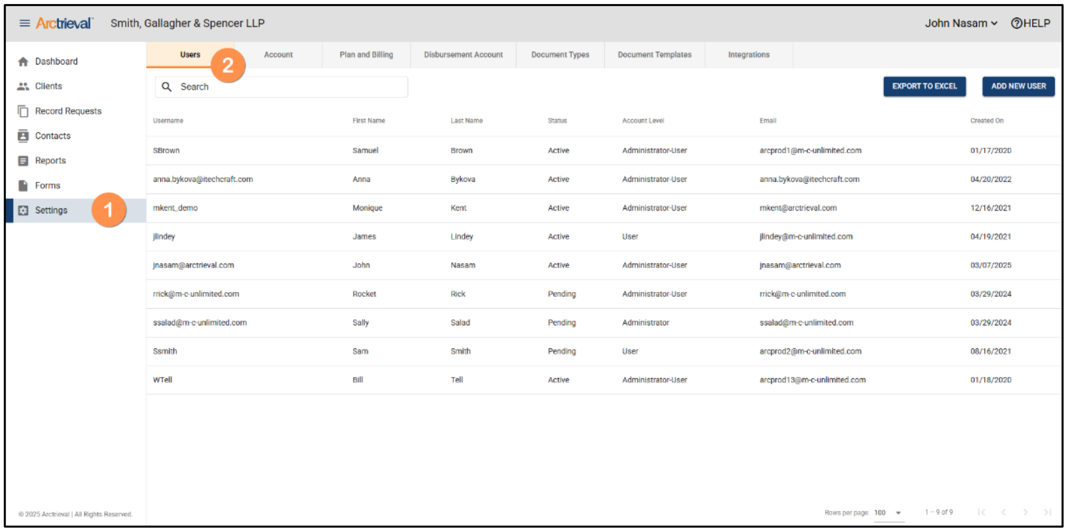
2. User Roles & Permissions

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.

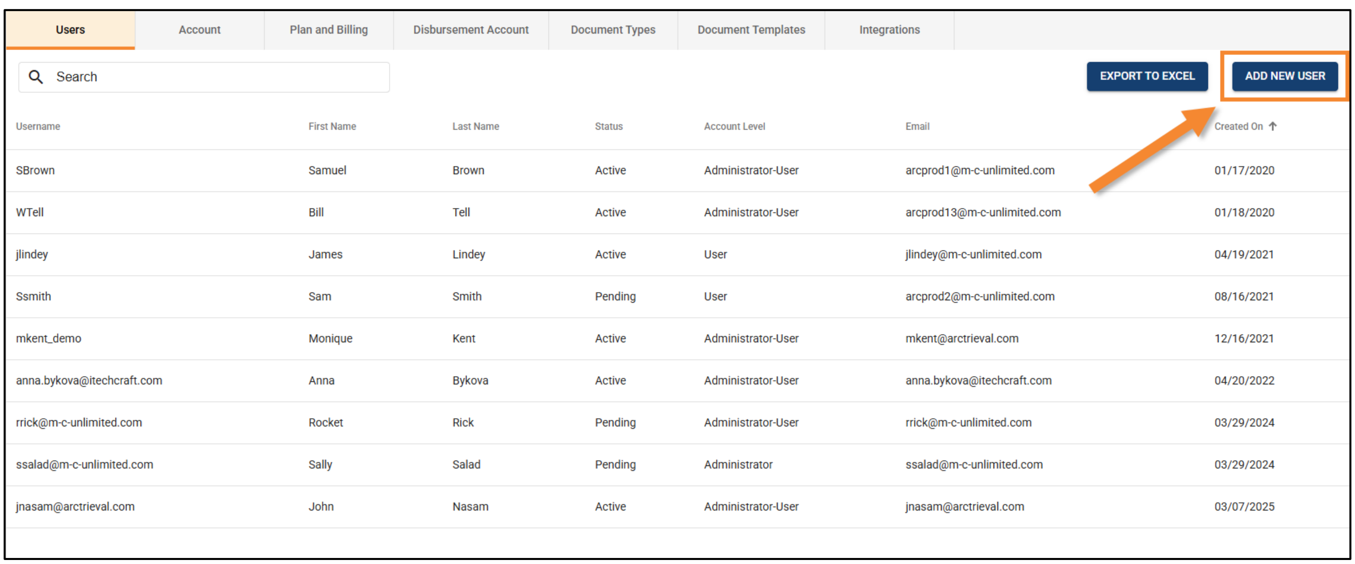
3. Accessing the Users Tab

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



4. Adding a New User

If your firm has a team member, such as a records assistant or paralegal, who will be using Arctrieval and you have an available user license, you can add them as a user to your account. Clicking the Add New User button in the top right corner of the Users tab allows you to enter their information, assign the proper access level, and send an account invitation so they can start using the platform.



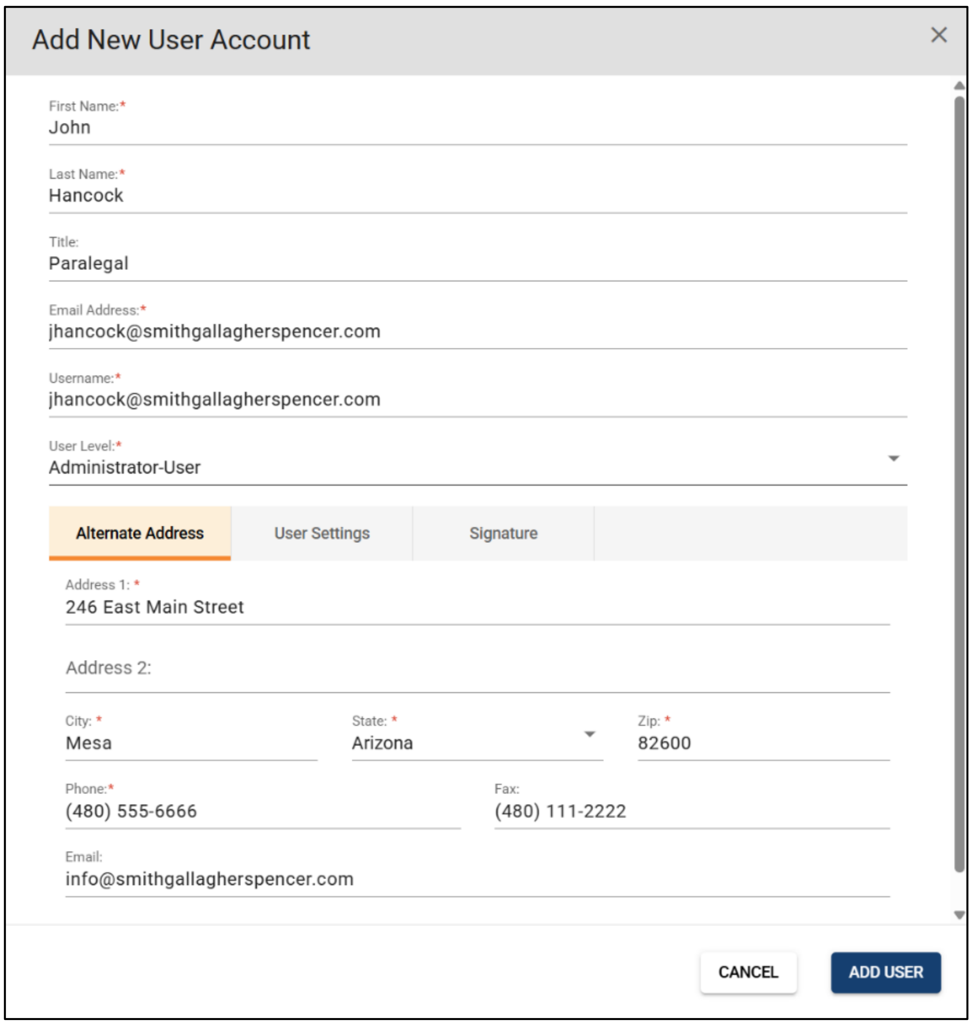
Username	First Name	Last Name	Status	Account Level	Email	Created On
SBrown	Samuel	Brown	Active	Administrator-User	arcprod1@m-c-unlimited.com	01/17/2020
WTell	Bill	Tell	Active	Administrator-User	arcprod13@m-c-unlimited.com	01/18/2020
jlindey	James	Lindey	Active	User	jlindey@m-c-unlimited.com	04/19/2021
Ssmith	Sam	Smith	Pending	User	arcprod2@m-c-unlimited.com	08/16/2021
mkent_demo	Monique	Kent	Active	Administrator-User	mkent@arctrieval.com	12/16/2021
anna.bykova@itechcraft.com	Anna	Bykova	Active	Administrator-User	anna.bykova@itechcraft.com	04/20/2022
rrick@m-c-unlimited.com	Rocket	Rick	Pending	Administrator-User	rrick@m-c-unlimited.com	03/29/2024
ssalad@m-c-unlimited.com	Sally	Salad	Pending	Administrator	ssalad@m-c-unlimited.com	03/29/2024
jnasam@arctrieval.com	John	Nasam	Active	Administrator-User	jnasam@arctrieval.com	03/07/2025

If you do not have an open user license, you will either need to add licenses to your account or remove an existing user to free up a license to assign to the new user. If you have questions about user licenses or upgrading your account, please contact us at support@arctrieval.com.

4.1. User Information

The fields in the first section of the Add New User Account dialog box, specify the person's identity and access level. It's important to enter accurate and complete information to ensure proper access and user management.

1. First Name and Last Name. Enter the user's legal or preferred name. This is how the user will appear in the system and in the requests.
2. Title. This field is optional and may be used to indicate the user's position within the firm, such as "Paralegal," "Legal Assistant," or "Office Manager."
3. Email Address. This is the email where the user will receive their account activation link, system notifications, and the default contact method for providers to reach out to the user or send records. The email must be valid and active.
4. Username. The username can be the same as the email address or a custom identifier, depending on your firm's preference.
5. User Level. Each user is assigned one of three account levels: Administrator, Administrator-User, or User. Refer to the chart in Section 2. In brief, User accounts can send record requests, Administrator accounts can access firm settings, and Administrator-User accounts can do both. Administrator accounts do not count toward your license limit.



4.2. Alternate Address

By default, the firm's address entered in the Account Tab will appear on record requests and correspondence sent through Arctrieval. This is common for firms operating from a single office where all staff share the same mailing address, fax number, and general email for incoming records.

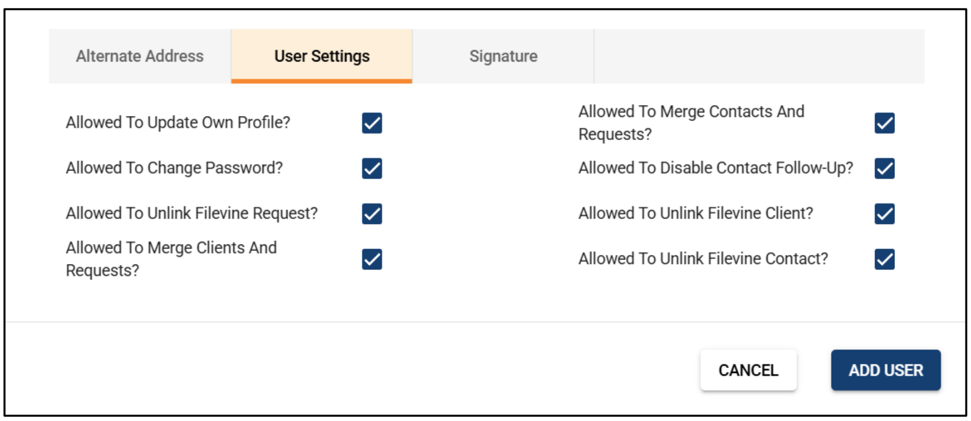
In most cases, an alternate address isn't needed. The alternate address is used when a firm has offices in multiple cities, states, or jurisdictions and wants providers to respond directly to that specific office or team. However, only using the firm's main address may not always be practical.

To address this, Arctrieval allows administrators to assign an Alternate Address for each user. This optional setting appears on the first tab after the user information when adding a new user and lets you enter a different mailing address, phone number, fax number, or email address specific to that user's location. When provided, this information overrides the firm's main contact details on any request or correspondence sent by that user. This ensures that medical records and provider correspondence go to the correct office, preventing delays and confusion, especially when each office or team manages its own requests independently.

4.3. User Settings

There are specific role-based permissions to assign to individual users that enable or disable certain functionalities in Arctrieval.

1. Allowed to Update Own Profile. This setting grants the user permission to change their own profile details, such as their name, title, email, alternate address, and signature. It also provides access to two additional settings.

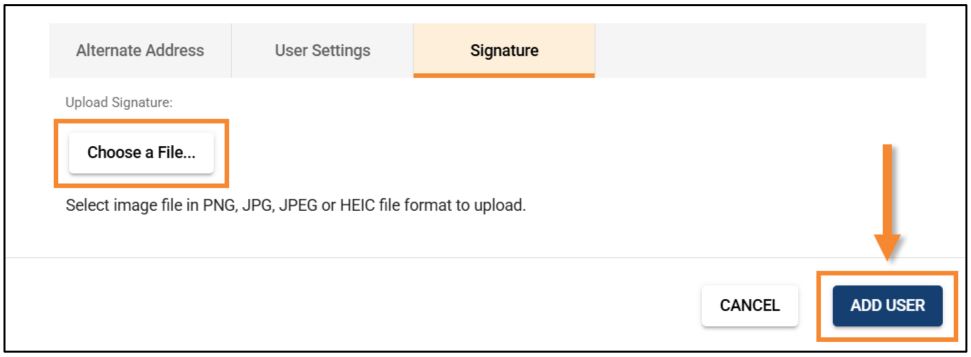


    - Default rows displayed per page, allowing users to select the number of records shown in data tables across Arctrieval.
    - Request Status Notifications allow users to enable or disable email alerts for upcoming scheduled follow-ups or when actions are required for a request.
2. Allowed to Change Password. This enables the user to update their login password at any time through their account settings.
3. Allowed to Merge Clients and Requests. When enabled, users can combine duplicate client profiles and consolidate all related requests into a single Client record. This helps maintain accurate and organized client data. Refer to our Merging Clients Guide for more details about this process.
4. Allowed to Merge Contacts and Requests. This feature enables users to combine duplicate contacts linked to different requests and consolidate all related requests into a single Contact or Provider record. Refer to our Merging Contacts Guide for further details about this process.
5. Allowed to Disable Contact Follow-up. This gives users the flexibility to turn Follow-Up Correspondence on or off for each provider.

If your firm uses a case management system like Filevine, additional options will appear in the User Settings. These include permissions to unlink a contact, client, or request from Arctrieval.

4.4. Signature

Administrators can upload a digital image of the user's signature, which the system will store in the user's profile. Once added, the signature will appear on all outgoing requests and cover letters for correspondence to give a more professional look. The user's signature may also be used on additional documents attached to the request, such as a Reproductive Health Information Attestation.

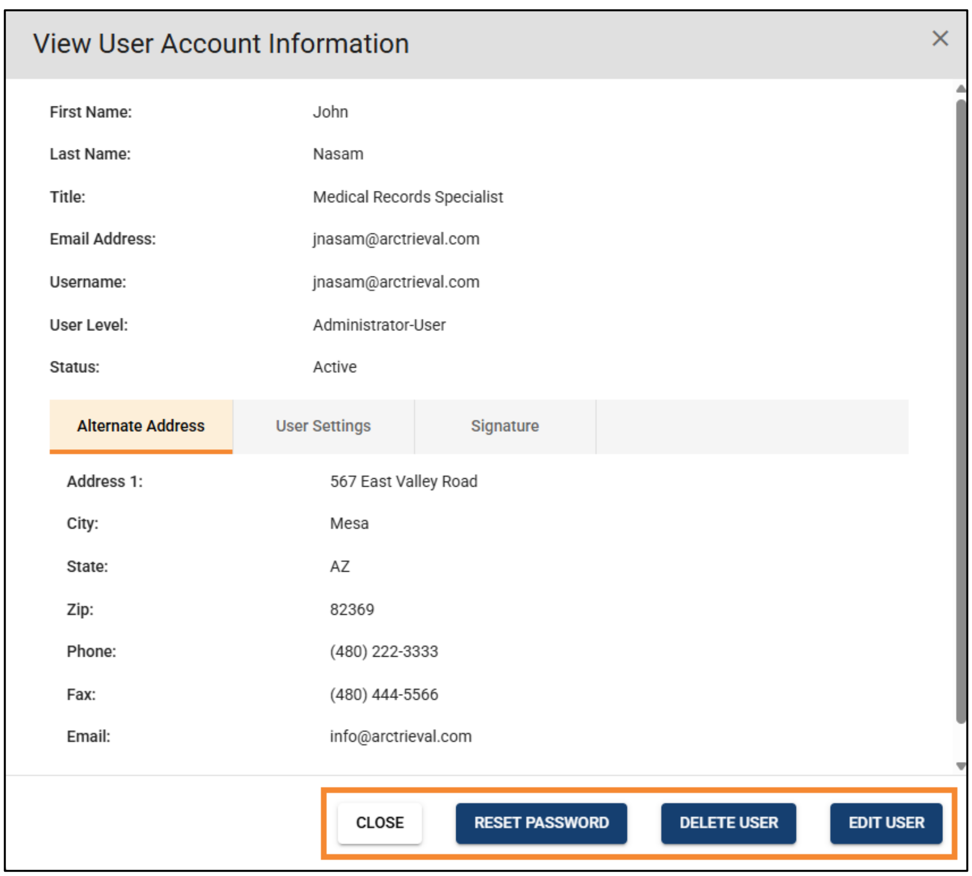


4.5. Activating the User Account

Once all required fields are filled out and settings are configured, click the "Add User" button to complete the setup. At this stage, the user's account status will show as 'Pending'. The new user will receive an Account Activation Email with their username and a link to create their password. The link remains valid for 2 hours from the time it is sent. After completing the setup, their Account Status will automatically change to Active.

5. Managing and Editing an Existing User

From the Users tab, administrators can view a complete list of all users currently linked to the firm's Arctrieval account. The list displays key details for each user, such as Username, First Name, Last Name, Status, Account Level, Email, and Created On Date. Each user is shown in a separate row in the data table.



5.1. Export to Excel

Administrators can export the complete user list by clicking the Export to Excel button located in the Users tab next to the Add New User button. This action generates an Excel file containing all visible user account information from the data table. The exported file includes key fields such as Username, Name, Status, Email, Account Level, and Created On Date. This feature is useful for internal documentation, audits, or tracking user management. The file is saved in .csv format and can be opened and edited with Microsoft Excel.

5.2. Edit User

To view or edit a specific user, click anywhere on their row. This opens the View User Account Information panel, where you can review the user's profile details and access several management options, including editing user information, updating settings, resetting passwords, or deleting the user account.

5.3. Reset Password

If a user forgets their password or cannot log in, administrators can initiate a password reset on their behalf. This option sends a Password Recovery email directly to the user's registered email address. The email contains a secure link that directs the user to an Arctrieval page where they can create a new password. The link remains valid for 2 hours from the time it is sent.

To ensure strong account security, the new password must meet the following requirements:

- A minimum of 8 characters in length.
- A maximum of 20 characters in length.
- At least one upper case character.
- At least one lower case character.
- At least one numeric value.
- The following special characters are allowed, but not required: !, @, $, %, &, *, ?
- It does not match any of the last three passwords.

5.4. Delete User

If a user leaves the firm or no longer needs access to Arctrieval, administrators can delete their account using the Delete User option. This action removes the user from the Users list and immediately revokes their access to the platform, helping maintain account security and ensuring that only active staff members keep access. While the user will no longer appear in the system, any requests they previously submitted remain intact and accessible within the firm's Arctrieval account. If the deletion was made in error or the user needs to be reinstated, their account can be recovered by Arctrieval Support at a firm Administrator's request.

5.5. Edit User

The Edit User option enables administrators to update any part of a user's profile. All fields and settings originally filled out when the user was first added—including their first and last name, title, email address, username, and account level—can be modified from this section. This feature is especially useful when a staff member changes roles within the firm, needs their contact information corrected, or should be assigned a different level of access. Changes made to a user's profile do not affect any record requests they have previously submitted, and updates take effect immediately after saving.

6. When to Use the Account Tab

The Users Tab should be used whenever your firm needs to manage user access, update account permissions, or keep an accurate list of active staff. Administrators are responsible for maintaining this list, especially as team members join, change roles, or leave the firm. By managing users properly, the firm ensures secure access, appropriate permission levels, and a clear understanding of how many user slots in your Arctrieval plan are actively being used.

You may need to access the Users Tab in the following situations:

- **A new staff member needs access to Arctrieval.** When onboarding a new team member, administrators can add them through the Users Tab so they can begin working in the platform. During this process, you'll assign a username, title, and appropriate account level to ensure the new user has the correct permissions.
- **A user has left the firm.** If someone is no longer with the firm or no longer needs access to Arctrieval, you can delete their user account. This prevents them from logging in, and their name will be removed from the user list. Requests they previously worked on will remain intact and associated with the firm's account. Deleted users can also be recovered upon request by contacting Arctrieval Support, as long as the request comes from an administrator.
- **You need to update a user's profile or permissions.** If a user's responsibilities change or there are updates to their contact details, the Edit User option allows you to make any necessary changes. All fields from the original setup such as name, email, title, and account level can be modified without affecting their previous request activity. This keeps the user's profile aligned with their current role in the firm.
- **A user has forgotten their password.** If a user can't log in because they forgot their password, you can initiate a password reset from their profile. This will send a password recovery email with a secure link that is valid for two hours. After the user sets a new password, they can log in normally without additional help.
- **You want to download a list of current user accounts**. The Export to Excel feature allows you to download a spreadsheet of all users currently linked to your firm's account. This can be useful for internal audits, checking the current user count, or simply keeping a backup of who has access and their permission levels.

These are some common scenarios where an administrator would use the Users Tab. Regularly reviewing your user list helps ensure that only current staff have access, that role assignments are accurate, and that no important updates are missed. Maintaining an up-to-date user list supports both internal security and smooth operations.