Record Requests
Activity Options

1. Overview

The Activity button on the Record Request detail page is how you interact and work on a request in process or already sent to a Contact. As shown in the image, the Activity button is in the upper right corner of the Record Request detail page.
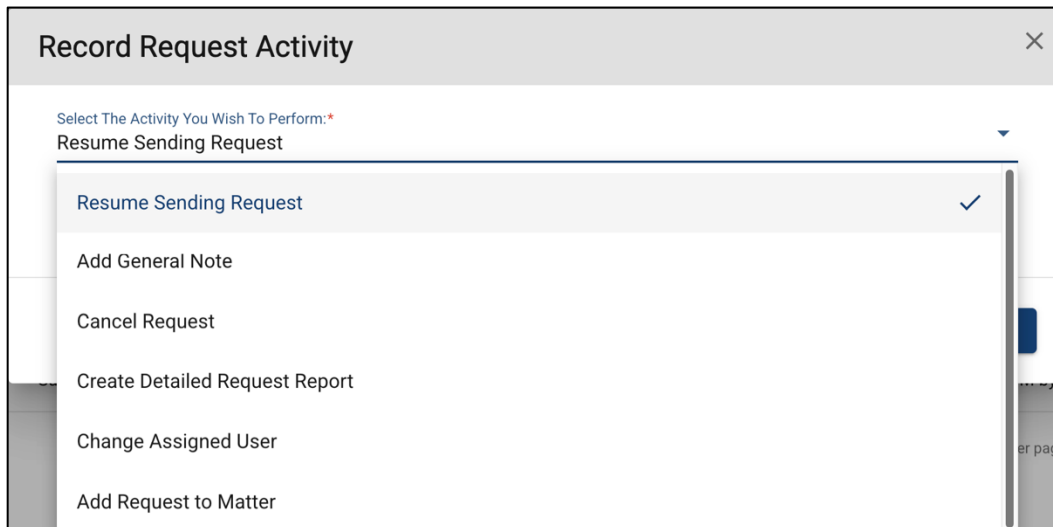

The request status will change as a request moves through the record request workflow. The following sections provide an overview of the available activities based on the current request status.

2. Saved as Draft

When a Request is in the Saved as Draft status, the Activities shown in the image below are available.

Resume Sending Request
The Resume Sending Request Activity enables you to continue working on the request. You can make changes and update the information for the request, save the request as a draft again, or send the request to the Contact.

Add General Note
The Add General Note Activity lets you add a note with any information you want to the request. The note is saved in the Request History.

Cancel Request
The Cancel Request Activity lets you cancel the Request altogether. Canceling a request is a permanent action and cannot be undone. You will be asked to confirm the Request Cancellation before it is done. You have two options when canceling a request:

1. Cancel the request and send cancellation correspondence to the Contact. This will inform the Contact that the request needs to be canceled and to stop working on it. For example, you would send correspondence to the Contact if you determine a case is unviable and no longer need records.
2. Cancel the request without sending any correspondence to the Contact. For example, if you receive a letter from the Contact and there is an error in the request, like the wrong date of birth or bad signature, there is no need to inform the Contact. Cancel the request and issue a new one after the issue is resolved.

When canceling the request, please keep the following in mind:

1. If the provider did not process the request, most providers will cancel the request.
2. If the provider started working on the request but did not send you an invoice, most providers will cancel the request in their system, which will be its end. However, if the provider starts working on the request, you may receive a processing or cancelation invoice for the work done on the request. The amount depends on what is allowed under local state law.
3. If the provider or a release of information vendor processed the request and sent you an invoice, you will probably receive a processing or cancelation invoice for the work done on the request. The amount depends on what is allowed under local state law.

Create Detailed Request Report

The Create Detailed Request Report Activity generates a PDF file containing detailed information about the request, including the Client Information, Request Information, Contact Information, History, a list of Documents and Files associated with the request, and Request Expenses. The PDF always contains the most recent and up-to-date information when it is created.

Change Assigned User

The Change Assigned User Activity allows you to change the Assigned User to the Request. You can change the Assigned User as many times as you would like.

Add Request to Matter

If using the Matter functionality in Arctrieval, the Add Request to Matter Activity allows you to associate the Request with a specific matter. The Matter functionality is for firms that do not have a case management system and want to track basic information about a client's claim or case.

3. Open and Active Requests

When a Request is in the Open, Saved as Draft, Incomplete, Rejected, Invoice Disputed, Invoice Paid, or Invoice Received status, the Activities shown in the image below are available.

Record Request Activity	✕
Select The Activity You Wish To Perform:* Add General Note	▼
Add General Note	✓
Received Invoice for Request	
Paid Invoice for Request	
Record Expense for Request	
Complete Request	
Complete Request-No Records	
Mark Request Incomplete	
Mark Request as Rejected	
Mark Request as Invoice Disputed	
Cancel Request	
Send or Resend Request or Follow Up Correspondence	
Disable Automatic Follow Up	
Create Detailed Request Report	
Change Assigned User	
Add Request to Matter	

Add General Note

The Add General Note Activity lets you add a note with any information you want to the request. The note is saved in the Request History.

Received Invoice for Request

After a Contact processes a request, the Contact may send you an invoice to pay for the record production cost before the information is released. The Received Invoice for Request activity lets you indicate the Contact responded to the request, sent an invoice, and the invoice is in-house waiting for payment. You can determine if and when you want to pay for the records. Completing the Received Invoice for Request activity changes the request status to Invoice Received and stops all future follow-up correspondence to the Contact.

Paid Invoice for Request

When you send payment or make an online payment for an invoice to a Contact, the Paid Invoice for Request activity lets you indicate in Arctrieval that the payment was made and you are waiting for information to arrive. Completing the Paid Invoice for Request activity changes the request status to Invoice Paid and stops all future follow-up correspondence to the Contact.

Complete Request

When you receive records from a Contact, the Complete Request lets you indicate in Arctrieval that you received information. You may upload the information you received to the request. Completing the Complete Request activity changes the request status to Completed and stops all future follow-up correspondence to the Contact.

Complete Request-No Records

You may receive correspondence from a Contact indicating they could not locate any information related to your Client based on the information in the request. If you believe the Contact made a mistake and records exist, use the Mark Request Incomplete activity to communicate with the Contact. If no records exist, the Complete Request-No Records lets you indicate in Arctrieval that you received a reply from the Contact and no records were available. Completing the Complete Request-No Records activity changes the request status to Completed-No Records and stops all future follow-up correspondence to the Contact.

Mark Request Incomplete

Sometimes, the response from a Contact will omit information specified in the individual right of access request. With an individual right of access request, you can control the situation and compel the Contact to correct their errors on your terms. By omitting information, regardless of the reason, the Contact has potentially violated the individual's rights under the HIPAA Privacy Rule. There is no need or reason to issue a new request. The Mark Request Incomplete Activity for a request offers a quick method to notify the Contact of their mistake and remind them of their responsibilities under the HIPAA Privacy Rule.

Please see Arctrieval's Incomplete Request Guide for detailed information and step-by-step instructions at https://www.arctrieval.com/support.

Mark Request as Rejected

Despite providing all the necessary information, a Contact may reject a 3rd Party HIPAA Authorization or Individual Right of Access request because they think it does not comply with HIPAA Rules and Regulations. Unfortunately, many Contacts and the release of information vendors, such as CIOX, MRO, Sharecare, Verisma, and their subsidiaries, do not adequately train their staff.

With an individual right of access request, you are in control and can compel the Contact to correct their errors. As stated, most rejections to an Individual Right of Access request are due to poor training and a lack of knowledge.

Please see Arctrieval's Rejected Request Guide for detailed information and step-by-step instructions at https://www.arctrieval.com/support.

Mark Request as Invoice Disputed

When a request is processed by a Contact or release of information vendors like Ciox, MRO, Sharecare, or Verisma, various issues may arise related to the invoice for the charges to produce a copy of the records. Some errors are honest mistakes by the person processing the request because they are not paying attention or adequately trained. The Mark Request as Invoice Disputed offers a remediation method for invoice and billing issues.

Please see Arctrieval's Disputed Invoice Guide for detailed information and step-by-step instructions at https://www.arctrieval.com/support.

Cancel Request

The Cancel Request Activity lets you cancel the Request altogether. Canceling a request is a permanent action and cannot be undone. You will be asked to confirm the Request Cancellation before it is done. You have two options when canceling a request:

1. Cancel the request and send cancellation correspondence to the Contact. This will inform the Contact that the request needs to be canceled and to stop working on it. For example, you would send correspondence to the Contact if you determine a case is unviable and no longer need records.
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1. If the provider did not process the request, most providers will cancel the request.
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3. If the provider or a release of information vendor processed the request and sent you an invoice, you will probably receive a processing or cancelation invoice for the work done on the request. The amount depends on what is allowed under local state law.

Send or Resend Request or Follow Up Correspondence

The Send or Resend Request or Follow Up Correspondence Activity is used when one of the following conditions is occurs:

1. A delivery error occurs for a request sent to a Contact because the email address or fax number was wrong.
2. The request needs to be sent to a different recipient.
3. A delivery error occurs for follow-up correspondence sent to a Contact.
4. The follow-up correspondence needs to be send to a different recipient.

After fixing the error and updating the information, the system will resend the initial request using the current email address, fax number, or mailing address on the Contact's record. For example, if you

encounter a delivery error because of an incorrect fax number, you should update the fax number for the Contact and resend the request.

> ⚠️ Only the Contact information on the request cover letter is changed. No changes are made to the individual right of access request document. If there is an error on the individual right of access signed by the patient or personal representative, you must cancel the request and issue a new one.

Similar to resending the initial request, you can resend the follow-up reminders to an updated email address or fax number.

Additionally, you have the option to send or resend the initial request or any follow-up correspondence to another recipient.

Disable Automatic Follow Up or Enable Automatic Follow Up
The Disable Automatic Follow Up or Enable Automatic Follow Up Activity stops or starts the system sending automated correspondence and follow-up notices to a Contact. You can change the communication methods with a Contact by turning automatic follow-up on and off. You can enable or disable the follow-up as often as you would like.

Create Detailed Request Report
The Create Detailed Request Report Activity generates a PDF file containing detailed information about the request, including the Client Information, Request Information, Contact Information, History, a list of Documents and Files associated with the request, and Request Expenses. The PDF always contains the most recent and up-to-date information when it is created.

Change Assigned User
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Add Request to Matter
If using the Matter functionality in Arctrieval, the Add Request to Matter Activity allows you to associate the Request with a specific matter. The Matter functionality is for firms that do not have a case management system and want to track basic information about a client's claim or case.

4. Completed or Completed-No Records

When a Request is in Completed or Completed-No Records status, the Activities shown in the image below are available.

Add General Note
The Add General Note Activity lets you add a note with any information you want to the request. The note is saved in the Request History.

Record Request Activity ✕

Select The Activity You Wish To Perform:*
Add General Note ▼

Add General Note ✓

Reopen Request

Dispute Invoice

Create Detailed Request Report

Change Assigned User

Add Request to Matter

Reopen Request
The Reopen Request Activity will reopen with a Completed or Completed-No Records status to allow you to update or continue working on the request. The functionality changes the request status from Completed or Completed-No Records to Open or Past Due, depending on the request date. You may reopen and complete requests as often as you need.

Disputed Invoice
When a request is processed by a Contact or release of information vendors like Ciox, MRO, Sharecare, or Verisma, various issues may arise related to the invoice for the charges to produce a copy of the records. Some errors are honest mistakes by the person processing the request because they are not paying attention or adequately trained. The Mark Request as Invoice Disputed offers a remediation method for invoice and billing issues.

Please see Arctrieval's Disputed Invoice Guide for detailed information and step-by-step instructions at https://www.arctrieval.com/support.
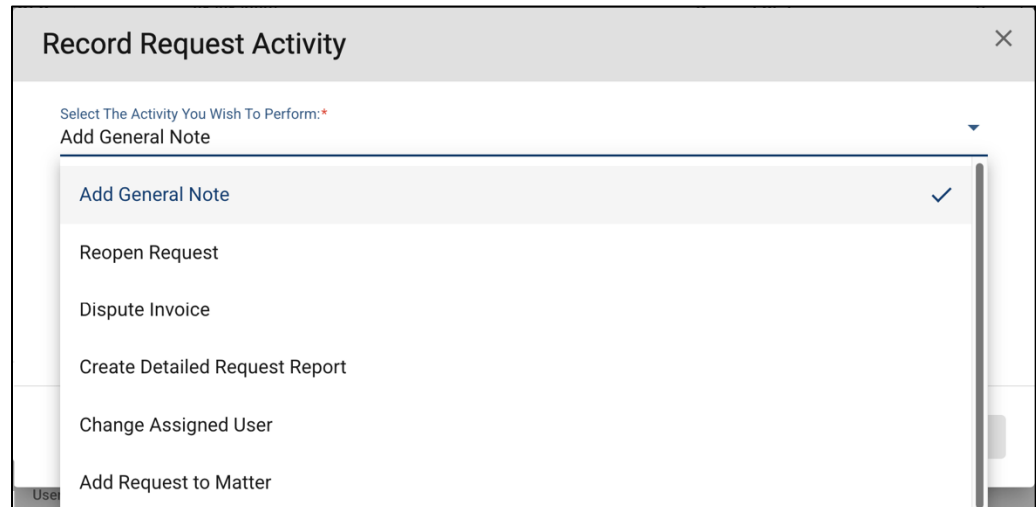
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5. Canceled

When a Request is in Canceled status, the Activities shown in the image below are available.
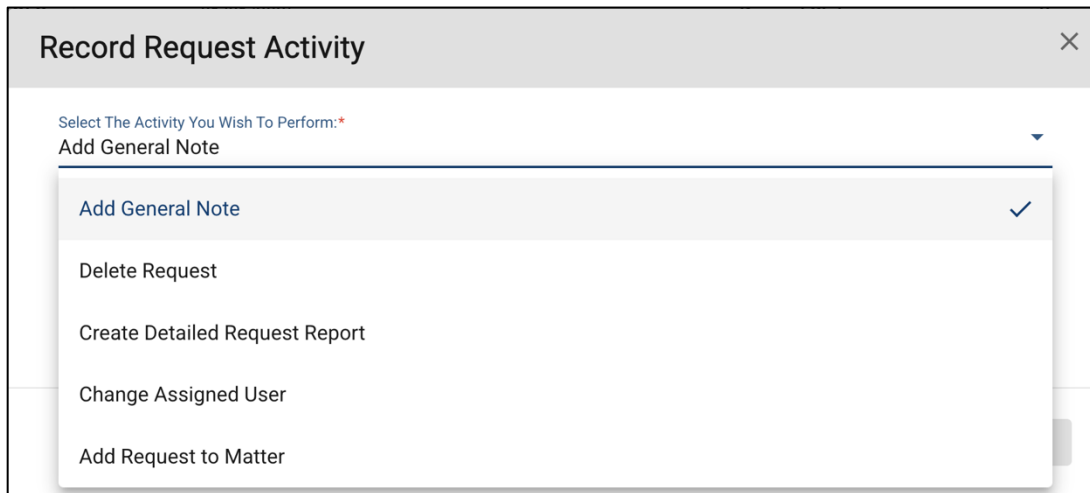
Add General Note
The Add General Note Activity lets you add a note with any information you want to the request. The note is saved in the Request History.

Delete Request
The Delete Request Activity deletes a request from your account. You can only delete requests that have a Canceled status. The functionality helps remove requests containing errors that were never sent to a Contact. If a request with an error was sent to a Contact, it is a best practice to Cancel the request but not delete it so you have a record of what happened.

Create Detailed Request Report
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