



Argent Getting Started Guide

A STEP-BY-STEP WALKTHROUGH FOR NEW USERS

This guide walks you through your first case in Argent Forensics, from account setup through your first extraction. It assumes no prior experience with the platform. If you run into anything not covered here, the support form at argentforensics.com is available and you can expect a response quickly to any questions you send. This is also the place to send us user feedback – we want to hear the good, the bad, and everything in between to ensure that we continually strive to make the platform better over time.

Thank you for using Argent!

PREPARED BY: ARGENT FORENSICS
[WWW.ARGENTFORENSICS.COM](https://www.argentforensics.com)
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Before You Begin

A Note on Methodology

Practitioners must understand the categories of computer science that drive modern analytical tools. Argent Forensics is a professional instrument. Like any instrument, it produces reliable results when used as designed — and less reliable results when shortcuts are taken. The single most important methodological principle for using Argent is this:

Every AI-generated output must be verified against the cited source document before it informs your analysis.

The platform's citation architecture makes verification fast — every output is linked to a specific document and page number. Fast does not mean optional. Verification is the step that makes Argent's outputs professionally usable. It is also the step that protects you if your methodology is challenged. Plan for verification time in your workflow from the start.

Set Up Your Account

Getting Onboarded

After subscribing or purchasing a Project Pass, you will receive a confirmation email at your registered address. The email contains a link to activate your account. Click the link, set your password, and complete the account setup process.

Account setup includes reviewing and signing your Business Associate Agreement. The BAA is a required step — you cannot use the platform until it

is completed. It governs how Argent handles your case data, establishes your rights regarding that data, and documents Argent's security and confidentiality obligations. If you have questions about any of its terms, contact support before completing setup.

Once setup is complete, you will land on your case dashboard. This is your home base in the platform — where you create cases, access active cases, and manage archived cases.

Note for group practice accounts: If your account includes multiple practitioner seats, the Practice Owner completes account setup and manages user access from the account settings. Individual practitioners log in with their own credentials and access only their own case files.

Prepare Your Records

Prior to Upload

A few minutes of preparation before uploading will meaningfully improve the quality of your outputs. The platform's AI processing is only as good as the material it receives — well-organized, clearly legible records produce better outputs than disorganized or poorly scanned ones.

File format. Argent accepts PDF files and common image formats. PDFs produce cleaner OCR output than image files. You can expect to receive some notice if text is too illegible for reliable OCR completion.

Legibility. If records include handwritten sections, review them briefly before uploading. Heavily degraded handwriting — faded ink, unusual letter formation, small script — will produce lower quality OCR output. Flag these sections for your own direct review regardless of what the platform produces.

Organization. Keep your records distinct before uploading — a hospital record should represent one file, a prior evaluation as another, law enforcement records as a third — rather than combining everything into a single large document. This makes document-level summaries much more useful and makes the source citations in AI-generated outputs easier to navigate as well.

Redundancy. There is no need to remove duplicate pages, fax cover sheets, or repeated notes before uploading. Argent's processing handles redundancy — it identifies and consolidates repeated content so your outputs reflect the substance of the record rather than its administrative bulk.

File naming. Name your files descriptively before uploading — "St_Mary_Hospital_Records.pdf" rather than "Scan_0047.pdf." This will help you stay organized and ensure that your source list extractions work properly. Try to maintain a repeatable and consistent naming convention where possible.

Create a Case

It All Starts Here

From your dashboard, select New Case. Enter a case name using whatever naming convention you use in your existing practice — Argent does not require a specific format. You will be given the option to batch upload preliminary records as well.

Once you have completed all necessary fields you will be taken to the case workbench. The workbench is your working environment for the evaluation — the place where you upload any additional records, access AI-generated outputs, run queries, and manage extractions.

Upload your record files using the upload interface in the left sidebar. Files can be uploaded in any order — Argent processes them individually and adds

each to the case file as processing completes. You can add additional records at any point during the evaluation as new records arrive. You do not need to have all records before you begin working with what you have.

Processing time: A typical forensic record set processes within a few minutes. Larger files — hospital records spanning thousands of pages, for example — may take longer. You can begin working with processed files while others are still processing.

Review Your Document Summaries

Narratives That Outline the Record Content

Once your records have processed, navigate to the Summaries section of your workbench. You will find two types of summaries:

Document-Level Summaries are automatically generated for each uploaded file individually (assuming AI is turned “on” for that case. Each summary extracts the clinically and forensically relevant content from that specific record set — diagnoses, hospitalizations, medications, significant incidents, legal contacts, treatment history. If you need to summarize a document for your evaluation, this text can be a starting point. Alternatively, use it as an overview to inform your interview.

Case-Wide Aggregate Summary is an option once multiple documents have been processed. It draws from all uploaded records simultaneously and provides a synthesized picture of the full case file, surfacing the most clinically significant facts across the entire record set. You must manually generate aggregated summaries, so you can choose at what point (or if) you would like to do so. As with any AI-Assisted Artifact, your summaries can be extracted into document files for insertion into your forensic report. The extraction will include metadata (the day/time of the output, as well as the LLM model version).

How to use summaries effectively:

Read through each summary and verify the citations — click through to the source document to confirm that the extraction is accurate.

If you identify a significant inaccuracy (an output that mischaracterizes the source or data) please consider reporting it through the Report an Issue form. Every reported error is reviewed and responded to.

The summary is a working document, not a finished one. It is the starting point for your analysis — a structured foundation that your clinical judgment builds on. It does not tell you what to conclude. It tells you what is there.

Review Your Chronologies (Timelines)

Key Events Extracted Chronologically

Navigate to the Smart Chronology section of your workbench. You will find a timeline of key events extracted from your uploaded records, such as hospitalizations, legal contacts, psychiatric evaluations, significant incidents, diagnoses, or medication changes. Each entry linked to its source document via citation.

The chronology is available at two levels. The document-specific chronology organizes events within a single record set, and is created automatically when the record uploads (assuming AI is turned “on” for the case). The case-wide chronology draws from all uploaded documents and presents the full clinical and legal history of the case in a single timeline. As with summaries, this is a feature you have to manually activate, so use it as much or as little as you would like. You have the option to regenerate case wise chronologies as new records are added, though regeneration will not make sense with every

record addition and this is why you are given control over this process manually. As with any AI-Assisted Artifact, your chronologies can be extracted into document files for insertion into your forensic report.

How to use the chronology effectively:

Review the chronology for completeness and accuracy. Verify citations against the source documents. The chronology is a starting point for your review — it organizes the documented history of the case and makes patterns visible. It should be read alongside your own review of the source documents, not as a replacement for it.

Use the AI Assistant

Chat With Your Records

Navigate to the AI Assistant panel of your workbench. Type a question about your case in plain language. The Assistant will return a cited response drawn from your uploaded records.

Begin with a question whose answer you can easily verify from your own record review, which gives you some baseline for evaluating the quality of the Assistant's responses on your specific case and record set. Once you have a feel for the interaction process, use the Assistant to explore areas of the case you want to review more comprehensively. Avoid asking questions that invite the AI to provide opinions or forensic analysis – it is programmed to avoid doing so, and will attempt to return your focus back to the grounded record. Ideal questions are precise and focused on the record exclusively, rather than on interpretive inferences or reflections outside of the data set.

Suggested first queries:

– "Summarize all documented psychiatric hospitalizations." – "Are there any positive toxicology screens in the records, and if so when and for what

substances?" – "What is a listing of diagnoses that appear within the documents?" – "Are there any references to prior violent behavior or threats?" – "Summarize all documented substance use history." – "When was the first documented hospitalization?" – "How many different arrests have there been since 2024?"

Using the Assistant for hypothesis exploration:

As your evaluation develops and your clinical hypotheses evolve, use the Assistant to explore those hypotheses directly. Ask whether the records support or contradict a specific diagnostic impression. Ask whether there is documentation that bears on a particular forensic question. Ask for everything documented about a specific time period, provider, or incident.

This is the function that distinguishes AI-assisted record review from manual review most sharply: you can ask your records questions that would be impractical to answer through manual search of a large record set. Every response comes with citations. Every citation can be verified.

Verifying responses:

Apply the same verification discipline to AI Assistant responses as to summaries. For every fact that enters your analysis, verify the citation against the source document. Verify regardless of how confident the response appears.

Extract Your Work Product

Consider What Is Necessary for Your File or Report

When you are ready to extract your work product – at any point during or after your record review – navigate to the Extraction section of your workbench. Several extraction options are available:

Source List: A formatted citation log of every document in your case file — document type, source, date range where available, and page count. Review the source list before including it in your report to confirm it accurately reflects the complete set of records reviewed for the evaluation. Records reviewed outside the platform will need to be added manually.

Individual AI Artifacts: Individual summaries, chronology exports, and AI Assistant response logs can be downloaded separately. All exports include the metadata attached to each output — date and time of generation, model version, source citations. You may maintain this within Argent or extract and retain this archive as part of your methodological documentation for the evaluation. It is your evidentiary record of what the AI did.

Original Record Files: The individual records from your case file (or all of them) can also be extracted for easy discovery provision. components of your case file — original uploaded documents, AI-generated artifacts with metadata, and query history.

Read-only archived cases: If your subscription has lapsed or your Project Pass has expired, your case transitions to read-only archived status. All extraction functions remain available in read-only archive — you can download original documents, export AI artifacts with metadata, and extract original records at any time during the ten-year post-cancellation retention period.

Frequently Asked Questions

Common Questions From New Users

Can I upload records as they arrive rather than all at once?

Yes. You can add records to a case at any point during the evaluation. The platform processes new uploads and integrates them into existing summaries

and the chronology. Re-running a query after adding new records will include the new documents in the response.

What if a record is in a format Argent can't process well?

The platform will process it to the best of its ability and flag sections where OCR quality is low. For records where processing quality is poor — heavily degraded handwriting, unusual document formats, very small print — plan to review those sections of the source document manually rather than relying on AI-generated outputs for that material.

How do I know if a summary or chronology is missing something?

You don't — not without reading. You can also use the AI Assistant to query specifically for information you expected to find and didn't see in the summary or chronology. The combination of your manual reading plus output review and targeted querying is more comprehensive than either alone.

What if I disagree with how the AI summarized something?

The AI summary is a starting point, not an authority. If the summary characterizes something differently than you would, go to the source — verify the citation, read the original passage, and form your own judgment about what it means. Your professional interpretation of the primary source is what matters. The summary is a navigational aid, not a clinical conclusion.

Can I use the platform on multiple cases simultaneously?

Yes. Subscription users have unlimited case access and can work on multiple cases concurrently. Each case has its own workbench environment and its own isolated record set. Records uploaded to one case are not accessible from another case's workbench.

A NOTE ON PROFESSIONAL DISCLOSURE

Every evaluation in which you use Argent Forensics should be accompanied by disclosure of AI-assisted record review in your forensic report. The Sample Report Disclaimer available at argentforensics.com/resources provides ready-to-use language for this disclosure in multiple formats.

Your retainer agreement or engagement letter should also include disclosure of AI tool use to the retaining party. The Sample Informed Consent language at argentforensics.com/resources provides multiple options for retainer-level disclosure across different practice contexts.

If you are unsure about the disclosure requirements that apply in a specific jurisdiction or evaluation context, consult colleagues and/or an attorney before proceeding.

IF YOU NEED HELP

The support form is accessible from the footer on every page of the site and from within the platform. Describe your issue in as much detail as possible — including what you expected to happen and what actually occurred. You can expect a response within one business day. Issues involving active cases are prioritized.

For general inquiries, you can also reach us directly at support@argentforensics.com.

CONTACT AND FURTHER INFORMATION

Argent Forensics LLC

www.argentforensics.com/resources

support@argentforensics.com

Additional professional resources, including Sample Informed Consent and Report Disclaimers, APA AI Tool Evaluation Checklist, and Testimony Preparation documents, are available for free download at www.argentforensics.com/resources.

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