



Arctrieval Legal
Arctrieval <> Clio Integration Setup Guide

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1. Introduction

Arctrieval is a unique software-based approach to obtaining and managing medical records, billing information, and imaging studies for legal professionals. Clio Manage is a leading case management system law firms use to manage their business.

Arctrieval's integration with Clio Manage is our commitment to our mutual customers. The integration provides additional functionality and features that improve the overall workflow and enhance the user experience, making your work more efficient and effective.

2. Functionality Overview

Arctrieval's integration provides the following functionality between the two systems.

1. Client Information
 - a. Import Clio Client information from Clio Contacts List into an Arctrieval Client record through the Arctrieval Add Client process. One client is added from Clio to Arctrieval at a time.
 - b. Pull updated Clio Client information from Clio Contacts List into the Arctrieval Client record through the Arctrieval Client Activity Update From Clio process. Client information is updated in Arctrieval one Client at a time.
 - c. Push updated Arctrieval Client information from Arctrieval Client records to Clio Contact through the Arctrieval Edit Client process. When Client information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Clio Client information in the Clio Contacts List.
 - d. Link an existing Arctrieval Client record with an existing Clio Client in the Clio Contacts List.
 - e. Remove the link between Clio Client information from Clio Contacts List and Arctrieval Client record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
2. Medical Provider Information (Arctrieval Contact)
 - a. Import Clio Medical Provider information from the Clio Contacts List for Companies into an Arctrieval Contact record through the Arctrieval Add Contact process. Each medical provider is added from Clio to an Arctrieval Contact one at a time.
 - b. Pull updated Medical Provider information from the Clio Contacts List for Companies into the Arctrieval Contact record through the Arctrieval Contact Activity Update From Clio process. Each contact is updated in Arctrieval one at a time.
 - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to a medical provider in the Clio Contacts List for Companies through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Clio Contacts List for Companies.
 - d. Link existing Arctrieval Contact record with an existing Clio Contacts List for Companies in the Filevine Address Book.
 - e. Remove the link between information from the Clio Contacts List for Companies and the Arctrieval Contact record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
3. Link Arctrieval Requests to an existing Clio Matter
 - a. When the request is sent through Arctrieval, the User selects a Clio Matter, and Arctrieval automatically links it to the Clio Matter.
 - b. If a request was started, created, and sent through Arctrieval, the request can be linked after the fact to an existing Clio Matter.

4. Data synchronization between Arctrieval and Clio
 - a. Arctrieval creates an Arctrieval folder on the Documents tab when a request is issued or linked.
 - b. Within the Arctrieval folder:
 - i. Each Arctrieval request activity is stored in a subfolder with the request ID, the facility's name, and the type of request (medical, billing, or imaging).
 - ii. All documents related to the request are stored in the request folder.
 - iii. A Comment is created and updated by Arctrieval showing the Request Info: History and Request Expenses
 - c. Arctrieval creates and maintains a Note for each request.
 - d. Users can store the Request History information in a Matter as a document comment, a Note, or both in Clio.
 - e. All documents created or uploaded in Arctrieval are uploaded to the designated request document folder in Clio.

3. Document Change History

Date	Document Revision	Description of Changes
8/2/2024	1.0	Initial Document.

4. Integration Setup

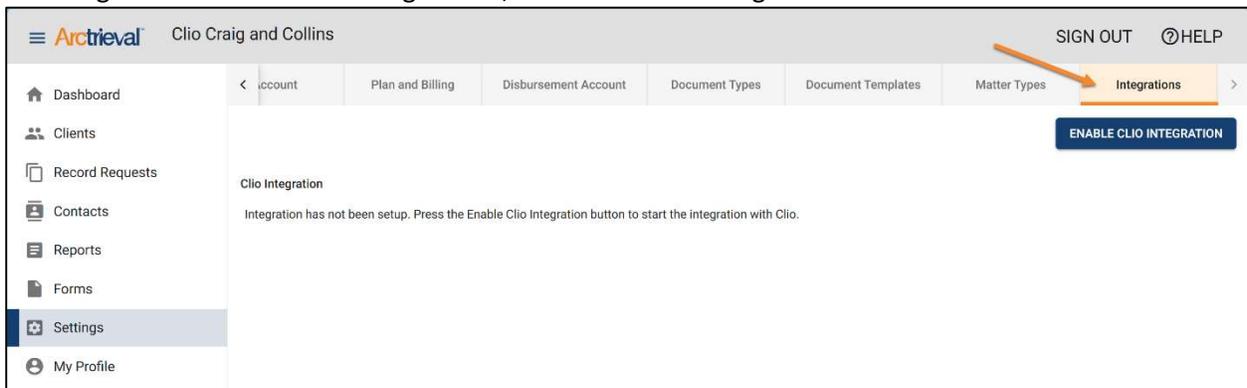
4.1. Overview

To enable Clio and Arctrieval to communicate and exchange data, the following must occur:

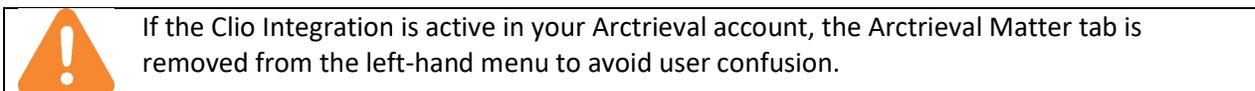
1. Arctrieval activates the Integrations tab in the Arctrieval Settings for firms with a multiple-user subscription. The Clio integration feature is only available to firms with a subscription for multiple users. Please get in touch with Arctrieval to activate the feature.
2. On the Arctrieval Integration page, in the Settings menu, you must grant Arctrieval access to your Clio Manage Account to establish the link between Clio Manage and Arctrieval.
3. Add required Custom Fields to Clio Manage
4. Add required Document Categories to Clio Manage

4.2. Establishing the Link

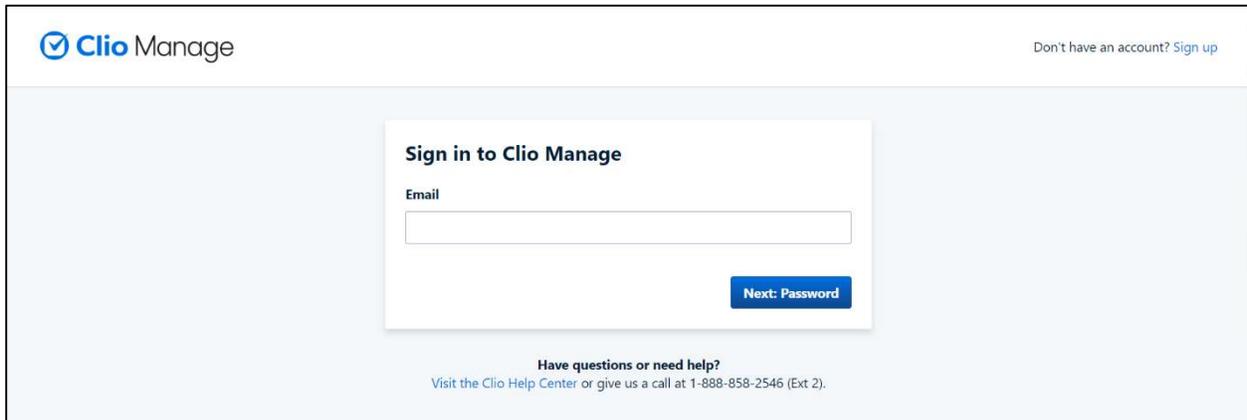
Once the Clio and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.



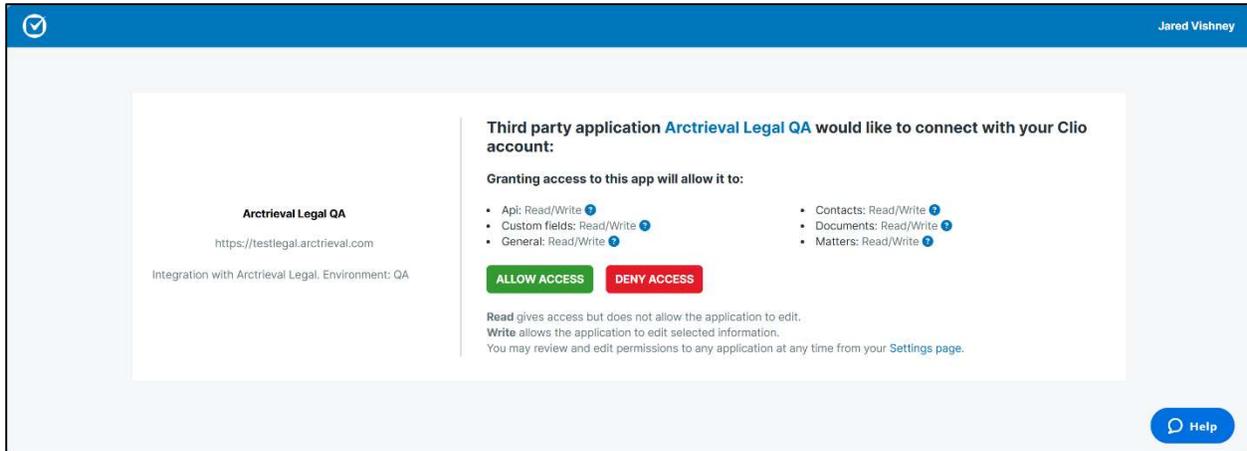
Clicking the Enable Clio Integration button will redirect you to the Clio Manage application, where you must approve Arctrieval's access to your Clio account, as shown in the image.



If you have not been previously authorized in the current browser, you must enter your email and password to access Clio Manage.



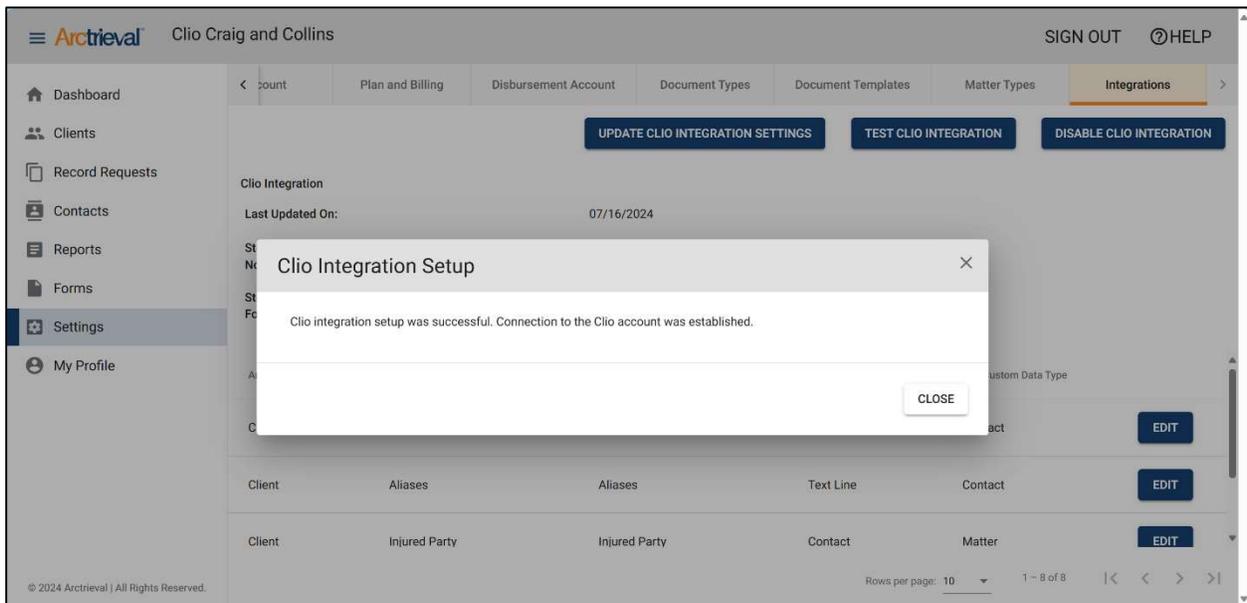
After signing into Clio Manage, you will see the page to grant third-party application access to your Clio account. Click the Allow Access button, and Arctrieval will establish the connection to your Clio Account, as shown in the image.



For the integration to work, you must grant read and write access to the following areas:

- Api
- Contacts
- Custom fields
- Documents
- General
- Matters

After allowing access, you are redirected to the Arctrieval Integration settings page. The image displays the success message to show whether the integration was successful.



During the integration, the following activities occurred:

1. Obtaining an access token
2. Creating the necessary Arctriever Custom Fields (if any are missing).
3. Creating the necessary Document categories (if any are missing).

The Integrations Settings page will be displayed when closing the Clio Integration Setup dialog box.

The screenshot shows the Arctriever interface for 'Clio Craig and Collins'. The 'Integrations' tab is active, displaying the Clio integration settings. At the top right, there are 'SIGN OUT' and 'HELP' links. Below the navigation bar, there are three buttons: 'UPDATE CLIO INTEGRATION SETTINGS', 'TEST CLIO INTEGRATION', and 'DISABLE CLIO INTEGRATION'. The main content area shows the following settings:

- Clio Integration**
- Last Updated On: 07/16/2024
- Store The Record Request History And Information In Matter Notes: Enabled
- Store The Record Request History And Information In Matter Folder Comment: Enabled

Below these settings is a table of custom fields:

Arctriever Data Type	Arctriever Field Name	Clio Custom Field Name	Clio Custom Field Type	Clio Custom Data Type	
Client	Last 4 Of SSN	Last 4 Of SSN	Text Line	Contact	EDIT
Client	Aliases	Aliases	Text Line	Contact	EDIT
Client	Language Preference	Language Preference	Picklist	Contact	EDIT
Client	Injured Party	Injured Party	Contact	Matter	EDIT

At the bottom right, there is a pagination control showing 'Rows per page: 10' and '1 - 8 of 8'.

4.3. Test Clio Integration

To verify the settings are correct, click the Test Clio Integration button on the integrations page. If the integration information is verified, you will see the message shown in the image.

The dialog box titled 'Clio Link Status' contains the following text: 'Clio link was verified. Connection to the Clio account was established.' At the bottom right, there is a 'CLOSE' button.

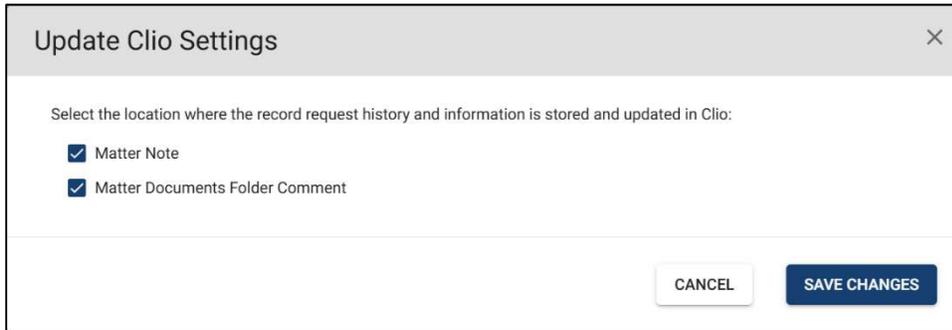


If the link verification fails, Arctriever cannot use the Setup information to access Clio Manage. Please verify that the data is correct and that you can enable a Third-Party connection within Clio Manage.

4.4. Update Clio Integration Settings

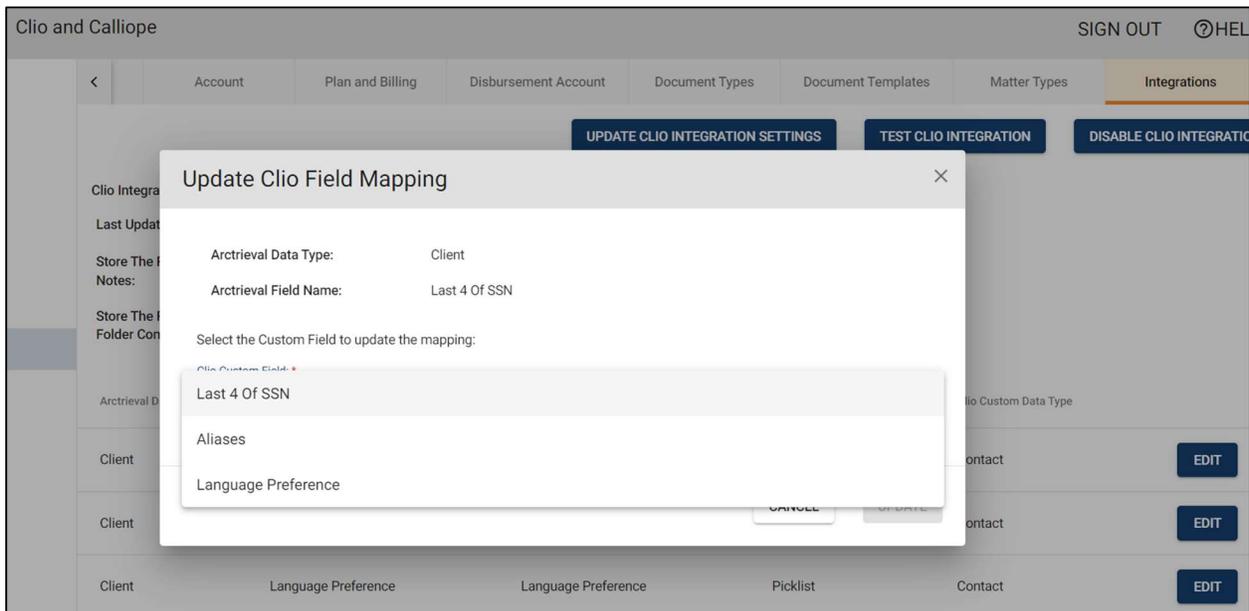
You can choose where the Request History information from Arctriever is stored and maintained in Clio. It can be stored in the Matter Note section or as a comment in the Record Request folder in the Matter Document section. By default, Arctriever places the information in both sections.

You can change where the information is stored by clicking on the Update Clio Integration Settings button, which displays the dialog box shown.



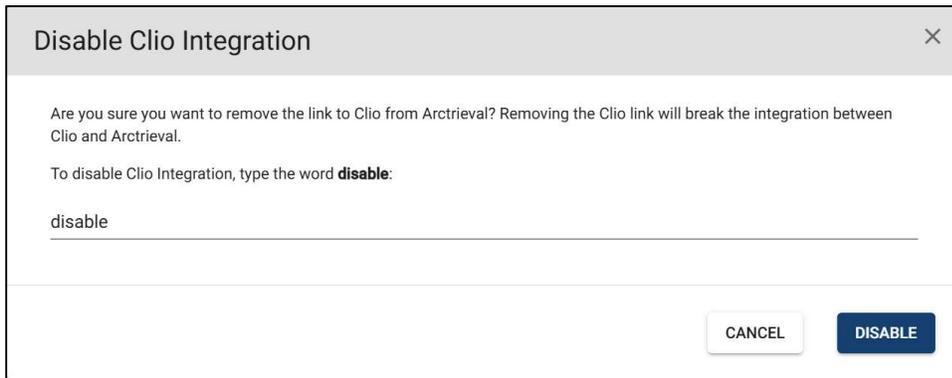
4.5. Clio Custom Field Mapping

The Attorney Firm Administrator can create a field with the appropriate type and desired name in Clio and then edit the mapping settings in Arctriever.

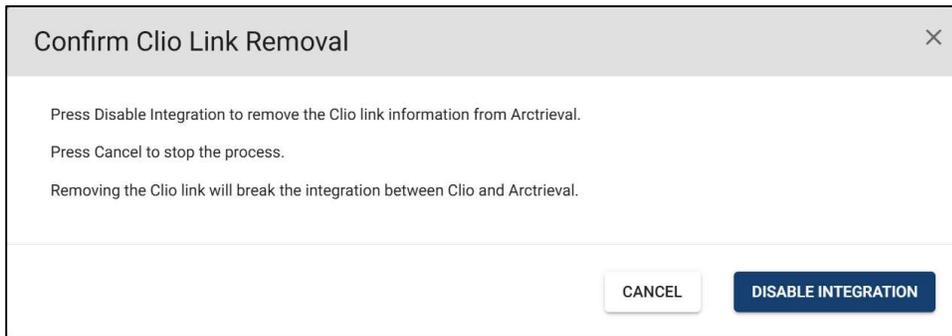


4.6. Disable Clio Integration

If you want to remove the integration between Arctrieval and Clio, click the Disable Clio Integration button and type the word disable as shown in the image.



As shown in the image, you are then asked to confirm you want to remove the link between Clio and Arctrieval.



Pressing Disable Integration will remove the link between Clio and Arctrieval.

5. Clio Settings

Arctrieval automatically creates all necessary objects in your Clio Manage account during the integration setup process. However, if the setup has any errors, a Clio Administrator must manually create the required objects as described below.

5.1. Arctrieval Document categories in Clio

Arctrieval uses the following Document categories as part of the integration:

- Arctrieval Intake Form—identifies the document in Clio signed by the individual or the personal representative giving the firm and Arctrieval permission to use their personally identifiable information and digital image of their signature to obtain information.
- Arctrieval Patient’s Photo ID—identifies the document in Clio that is the patient’s government-issued photo ID submitted with the request. Adding a photo ID is optional but a best practice.
- Arctrieval Relationship Documentation
- Arctrieval Representative’s Photo ID—identifies the document in Clio that is the personal representative’s government-issued photo ID submitted with the request. Adding a photo ID is optional but a best practice.
- Arctrieval Request Document—identifies documents created by the Arctrieval request process that are shared with Clio.

5.2. Arctrieval Matter Custom Fields in Clio

The Individual Fields are:

- Injured Party
- Personal Rep Relationship
- Personal Rep Relationship Other
- Matter Client is Injury Party
- Personal Representative

The Matter Field Set for Arctrieval is as follows:

Name	Members	Default
Arctrieval	Personal Representative, Personal Rep Relationship, Personal Rep Relationship Other, Matter Client is Injured Party, Injured Party	<input type="checkbox"/>

The Matter Custom Fields must be set as follows:

Custom Fields Section	Name	Field type	Values or options
Matter	Personal Representative	Contact Select	
Matter	Personal Rep Relationship	Picklist	<ul style="list-style-type: none"> ● Parent ● Legal Guardian ● Medical Power Of Attorney ● Next Of Kin ● Other
Matter	Personal Rep Relationship Other	Text (One-Line)	
Matter	Matter Client is Injured Party	Picklist	<ul style="list-style-type: none"> ● Yes ● No
Matter	Injured Party	Contact Select	



The Arctrieval integration assumes the injured individual is the Client Contact for a Matter. If the Client Contact is not the injured individual, then additional information is needed in the Arctrieval Customer Fields.

Custom Field Descriptions and Arctrieval Usage:

1. Personal Representative—Captures the contact information for the person who is the Personal Representative for the injured individual as defined by HIPAA. The Personal Representative would be a parent or legal guardian in the case of a minor child, the next of kin in the case of a deceased person, or someone named in a medical power of attorney.
2. Personal Rep Relationship—This option captures the nature of the relationship between the Personal Representative and the injured party. If the listed options do not correctly describe the relationship, you can select the “Other” option.
3. Personal Rep Relationship Other—A description of the relationship if the select relationship is “Other”
4. Matter Client is Injured Party—The Arctrieval integration assumes the injured individual is the Client Contact for a Matter. If this is true, you should select “Yes” or nothing. You should choose “No” if false so Arctrieval does not misuse the information. For example, if the mother, father, or legal guardian is the Matter Client, you would select “No.”
5. Injury Party—If the Matter Client Contact is not the Injured party and you selected “No,” you must indicate the person to use as the Injured Party.



After the integration between Clio and Arctrieval is established, changing or deleting the custom fields may break the communication between the two systems. If you need to make changes, we strongly recommend updating only the name in Clio and then updating the name in Arctrieval. Deleting a custom field is discouraged.

5.3. Arctrieval Contact Custom Fields in Clio

The Individual Fields are:

- Last 4 of SSN
- Aliases
- Language Preference

The Contact Field Set for Arctrieval is as follows:



The Contact Custom Fields must be set up as follows:

Custom Fields Section	Name	Field type	Values or options
Contact	Last 4 Of SSN	Text (One-Line)	
Contact	Aliases	Text (One-Line)	
Contact	Language Preference	Picklist	<ul style="list-style-type: none"> • English • Spanish

Custom Field Descriptions and Arctrieval Usage:

1. Last 4 Of SSN—The last four digits of the patient’s (injured party) social security number. The number is included on the individual right of access request to assist providers in identifying the individual and locating their information. It is an optional value in Arctrieval.
2. Aliases—Include other names that the patient (injured party) may have or currently uses, such as nicknames, as known as, or a maiden name. The names are included on the individual right of access request to assist providers in identifying the individual and locating their information. It is an optional value in Arctrieval.
3. Language Preference—Determines the preferred language Arctrieval software will use to communicate with the Contact (Arctrieval Client) when sending the Intake Form via email or SMS through Arctrieval. The email or SMS will be in the specified language. English is the default value. It is an optional value in Arctrieval.

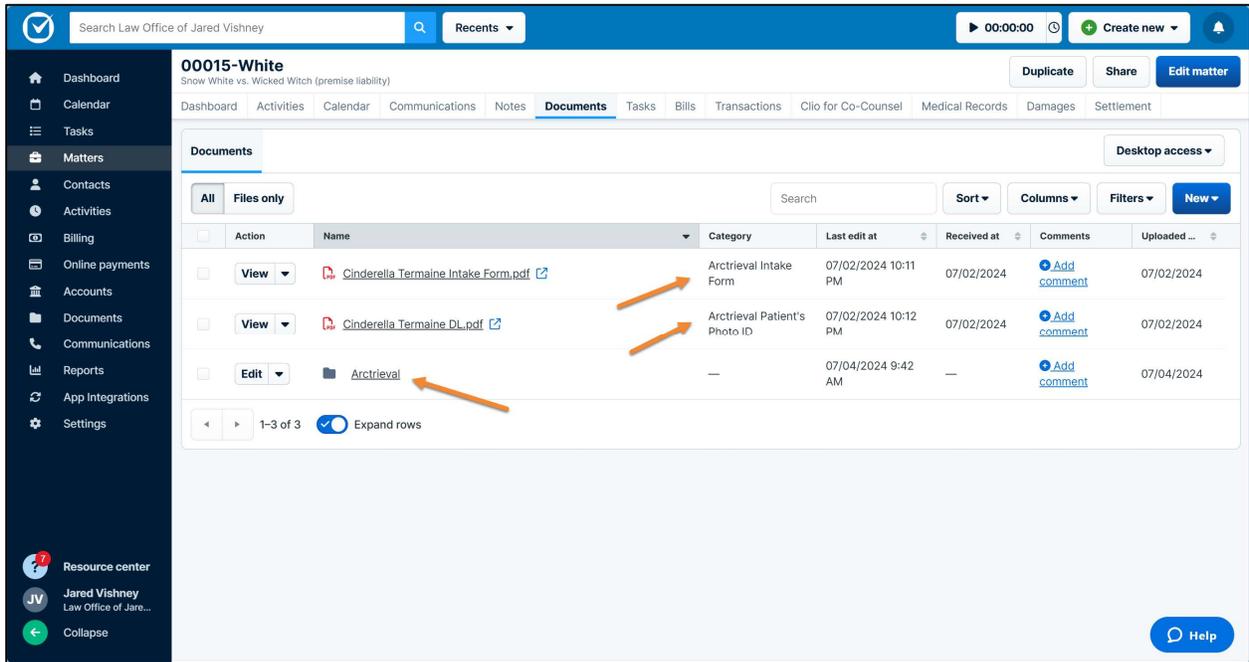


After the integration between Clio and Arctrieval is established, changing or deleting the custom fields may break the communication between the two systems. If you need to make changes, we strongly recommend updating only the name in Clio and then updating the name in Arctrieval. Deleting a custom field is discouraged.

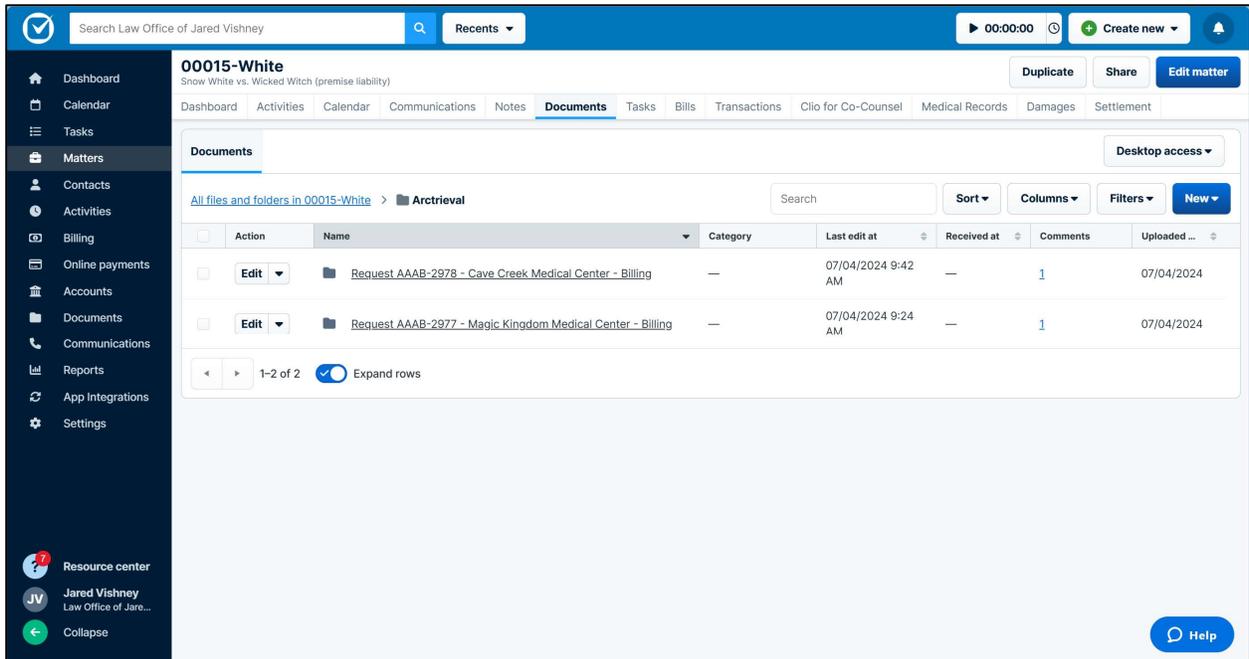
6. Data Structure in Clio

6.1. Documents

Arctrievall creates an “Arctrievall” folder in the Documents section of a matter to store information.



Within the Arctrievall folder, a unique folder is created for each request.



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Each unique request folder has a comment that contains the Request History information. Whenever an event or activity happens in Arctrievial for a Request, Arctrievial automatically updates the associated comment.



Arctrievial updates the Comment in Clio by **OVERWRITING** the entire comment with the information from Arctrievial. Any changes made to the Comments in Clio will be lost in the next update. If you need to make a note or add information about the request, you should do it in Arctrievial.

The screenshot shows the Clio interface for matter 00015-White. A modal window titled "1 Comments" is open, displaying a text input field and a "Post" button. Below the input field, the comment content is visible, including request information and a history of events.

Request Info:
Arctrievial ID: AAAB-2977
Facility Name: Magic Kingdom Medical Center
Starting Date Of Service:
Ending Date Of Service: 07/04/2024
Request Date: 07/04/2024
Request Due Date: 07/04/2024
Requested Information: Billing Statements (Itemized)
Request Status: Past Due
Last Activity Date: 07/04/2024

History:
07/04/2024 04:27 PM Note regarding request follow up actions sent to Clio, Craig at craigc@m-c-unlimited.com.
07/04/2024 04:24 PM The delivery was successful for the request or correspondence sent to Magic Kingdom Medical Center at MK_ROI@m-c-unlimited.com.
07/04/2024 04:24 PM Request final notice sent by email to MK_ROI@m-c-unlimited.com.
07/04/2024 04:24 PM Request final notice created. Request final notice is to be sent via email.
07/04/2024 04:21 PM Note regarding upcoming final notice sent to Clio, Craig at

All related documents are stored within each request folder. Every document related to the request created or uploaded to Arctrievial is automatically copied to the Request folder.

The screenshot shows the Clio interface for matter 00015-White, specifically the "Documents" tab. A table lists several documents related to the request, including their names, categories, last edit dates, received dates, and comments.

Action	Name	Category	Last edit at	Received at	Comments	Uploaded ...
View	Record_Request_Past_Due_Reminder_AAAB-2977.White_07-04-2024.12-17.pdf	Arctrievial Request Document	07/04/2024 9:17 AM	07/04/2024	Add comment	07/04/2024
View	Record_Request_Follow_Up_AAAB-2977.White_07-04-2024.11-50.pdf	Arctrievial Request Document	07/04/2024 8:50 AM	07/04/2024	Add comment	07/04/2024
View	Record_Request_Final_Notice_AAAB-2977.White_07-04-2024.12-24.pdf	Arctrievial Request Document	07/04/2024 9:24 AM	07/04/2024	Add comment	07/04/2024
View	Record_Request_Due_Date_Reminder_AAAB-2977.White_07-04-2024.12-02.pdf	Arctrievial Request Document	07/04/2024 9:02 AM	07/04/2024	Add comment	07/04/2024
View	Record_Request_AAAB-2977.White_07-04-2024.11-47.pdf	Arctrievial Request Document	07/04/2024 8:48 AM	07/04/2024	Add comment	07/04/2024

6.2. Notes

A unique Note is created in the Matters Notes section for each request. Whenever an event or activity occurs in Arctrievial for a Request, Arctrievial automatically updates the associated Note.



Arctrievial updates the Comment in Clio by **OVERWRITING** the entire comment with the information from Arctrievial. Any changes made to the Comments in Clio will be lost in the next update. If you need to make a note or add information about the request, you should do it in Arctrievial.

Actions	Recorded time	Date	Subject	Note	Author	Notifications
Edit	Add time	07/04/2...	Request AAAB-2978 - Cave Creek Medical Center-...	Request Info: Arctrievial ID: AAAB-297...	Jared Vis...	—
Edit	Add time	07/04/2...	Request AAAB-2977 - Magic Kingdom Medical Cent...	Request Info: Arctrievial ID: AAAB-297...	Jared Vis...	—

Edit note

Subject: Request AAAB-2978 - Cave Creek Medical Center - Billing

Note:

Request Info:
Arctrievial ID: AAAB-2978
Facility Name: Cave Creek Medical Center
Starting Date Of Service: 07/04/2024
Ending Date Of Service: 07/04/2024
Request Date: 07/04/2024
Request Due Date: 07/04/2024
Requested Information: HCFA Forms (CMS-1500), UB-04
Request Status: Past Due
Last Activity Date: 07/04/2024

History:

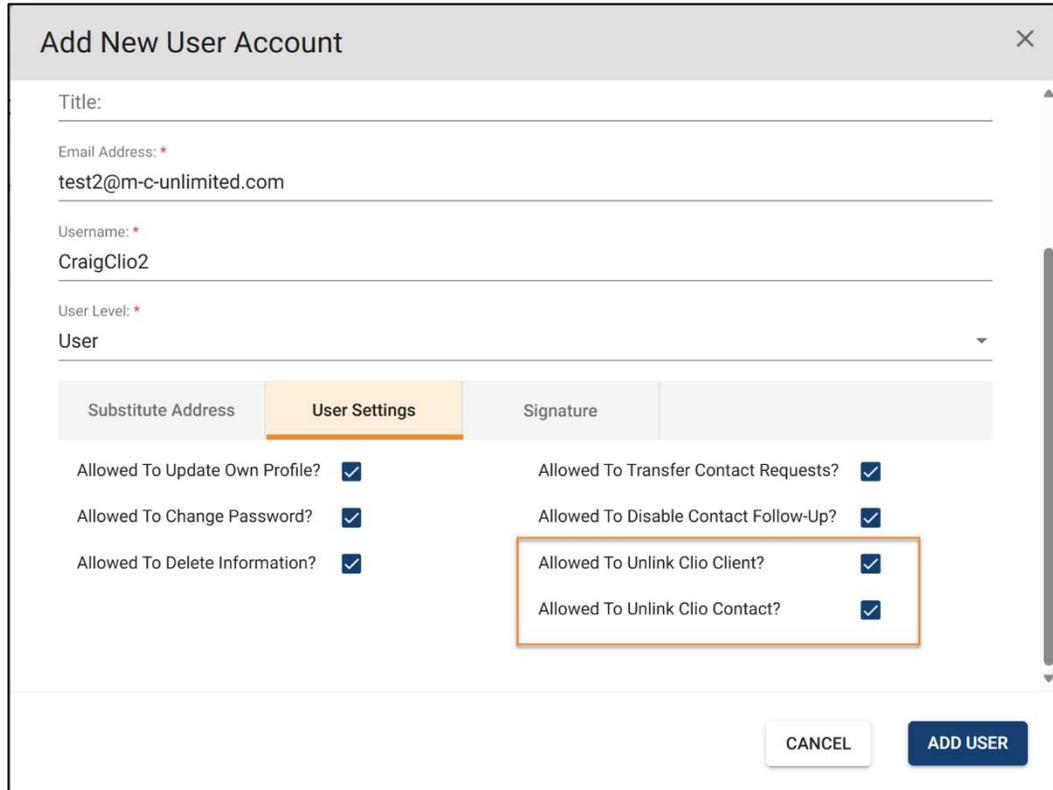
- 07/04/2024 04:44 PM Note regarding request follow up actions sent to Clio, Craig at craigclio@m-c-unlimited.com.
- 07/04/2024 04:41 PM The delivery was successful for the request or correspondence sent to Cave Creek Medical Center at CaveCreekMed@m-c-unlimited.com.
- 07/04/2024 04:41 PM Request final notice sent by email to CaveCreekMed@m-c-unlimited.com.
- 07/04/2024 04:41 PM Request final notice created. Request final notice is to be sent via email.
- 07/04/2024 04:38 PM Note regarding upcoming final notice sent to Clio, Craig at craigclio@m-c-unlimited.com.
- 07/04/2024 04:34 PM The delivery was successful for the request or correspondence sent to Cave Creek Medical Center at CaveCreekMed@m-c-unlimited.com.

Buttons: Save note, Cancel, Delete

7. Arctrieval Role-Based Permissions for Clio

When the Clio Integration is active in Arctrieval, additional role-based permissions are available to determine whether or not an Arctrieval User may Unlink a Clio Client or Clio Contact from the respective Client or Contact record in Arctrieval.

The Arctrieval User Administrator sets the permissions through the User Account Information, as shown in the image.



The screenshot shows a dialog box titled "Add New User Account" with a close button (X) in the top right corner. The form contains the following fields and settings:

- Title: (empty)
- Email Address: * test2@m-c-unlimited.com
- Username: * CraigClio2
- User Level: * User

Below the fields are four tabs: "Substitute Address", "User Settings" (highlighted with an orange bar), "Signature", and an unlabeled tab. Under the "User Settings" tab, there are two columns of permissions, each with a checked checkbox:

- Allowed To Update Own Profile?
- Allowed To Change Password?
- Allowed To Delete Information?
- Allowed To Transfer Contact Requests?
- Allowed To Disable Contact Follow-Up?
- Allowed To Unlink Clio Client? (highlighted with an orange box)
- Allowed To Unlink Clio Contact? (highlighted with an orange box)

At the bottom right of the dialog are two buttons: "CANCEL" and "ADD USER".



The permissions to Unlink Clio Client and Unlink Clio Contact are enabled by default.

8. Configuration Notes

1. If you turn off the Clio integration and then re-enable integration at a later date, any of the Request status changes, files, history, and information are not automatically updated in Clio when the integration is inactive. You must use the Update in Clio Active to update each request's information in Clio. Any new request changes are, again, automatically synchronized with Clio.