Arctrieval

Arctrieval <> MyCase Integration Setup Guide

May 13, 2025 Document Version 1.0

Confidential Document Do Not Distribute Without Permission

Table of Contents

1.	Introduction
2.	Functionality Overview3
3.	Document Change History4
4. 4.1. 4.2. 4.3.	Integration Setup
5. 5.1. 5.2. 5.3.	Custom Field Mapping
6. 6.1. 6.2.	Integration Testing
7.	Disable MyCase Integration12
8.	Company Mailing State Field Values13

1. Introduction

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

Arctrieval's integration with MyCase is a testament to our commitment to our mutual customers. This integration offers enhanced functionality and features that improve your workflow and enhance the user experience, ultimately 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 MyCase Contact information for a person into an Arctrieval Client record through the Arctrieval Add Client process. One person is added from MyCase to Arctrieval at a time.
 - b. Pull updated MyCase Contact information for a person into the Arctrieval Client record through the Arctrieval Client Activity Update From MyCase process. Client information is updated in Arctrieval one Client at a time.
 - c. Push updated Arctrieval Client information from Arctrieval Client records to MyCase Contact information for a person through the Arctrieval Edit Client process. When Client information is updated in Arctrieval, the Arctrieval User is prompted to update the information for the MyCase Contact information for the person.
 - d. Link an existing Arctrieval Client record with an existing MyCase Contact information for a person.
 - e. Remove the link between a MyCase Contact for a person and the Arctrieval Client record. Only an Administrator-User or User with the appropriate permissions may break the connection.
- 2. Medical Provider Information (Arctrieval Contact)
 - a. Import MyCase Company information (Medical Provider) into an Arctrieval Contact record through the Arctrieval Add Contact process. Each Compnay is added from MyCase to an Arctrieval Contact one at a time.
 - b. Pull updated Company information (Medical Provider) information into the Arctrieval Contact record through the Arctrieval Contact Activity Update From MyCase process. Contact is updated in Arctrieval one at a time.
 - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to Company in MyCase through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted to update the Company information in MyCase.
 - d. Link existing Arctrieval Contact record with an existing Company in MyCase.
 - e. Remove the link between MyCase Company and the Arctrieval Contact record. Only an Administrator-User or User with the appropriate permissions may break the connection.
- 3. Link Arctrieval Request to an existing MyCase Case
 - a. When the request is sent through Arctrieval, the User selects a MyCase Case, and Arctrieval automatically links it to the MyCase Case.
 - b. If a request was started, created, and sent through Arctrieval, the request can be linked after the fact to an existing MyCase Case.
- 4. Unlink Arctrieval Request from an existing MyCase Case
 - a. Remove the link between MyCase Case and the Arctrieval Request. Only an Administrator-User or User with the appropriate permissions may break the connection.

- 5. Data synchronization between Arctrieval and MyCase
 - 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.
 - c. Arctrieval creates and maintains a Note for each request.
 - d. All documents created or uploaded in Arctrieval are uploaded to the designated request document folder in MyCase.

3. Document Change History

Date	Document Revision	Description of Changes
5/13/2025	1.0	Initial Document.

4. Integration Setup

4.1.Overview

To enable MyCase 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 MyCase integration feature is only available to firms with a subscription for multiple users. Please contact Arctrieval to activate the feature.
- 2. On the Arctrieval Integration page, in the Settings menu, you must grant Arctrieval access to your MyCase Account to establish the link with Arctrieval.
- 3. Add required Custom Fields to Clients in MyCase.
- 4. Add required Custom Fields to Companies in MyCase.

4.2. MyCase User Permissions

The MyCase user setting up the integration with Arctrieval must have the "Manage your firm's preferences, billing, and payment options?" role/permission enabled.

Additionally, the integration is tied to the user who enabled it. MyCase will not allow you to deactivate a user tied to an active integration. If you need to remove the user from MyCase, you must:

- 1. Disable the MyCase and Arctrieval Integration.
- 2. Enable the MyCase and Arctrieval Integration with another user.
- 3. Remove the User from MyCase

4.3. Establishing the Link Between MyCase and Arctrieval

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

\equiv Arctrieval [*]	Mortim	ier & Duke (MyCas	& Duke (MyCase Demo)						
A Dashboard		Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations	
Lients								ENABLE MYCASE INTEGF	RATION
Record Requests		MYCASE INTEGRAT	ION						
Contacts		Integration has not bee	n setup. Press the Enable	MyCase Integration butto	n to start the integration with M	lyCase.			
Reports									
Forms									
Settings									

Clicking the Enable MyCase Integration button will redirect you to the MyCase application, where you must approve Arctrieval's access to your MyCase 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 MyCase.

📦 mycase			
Email jvishney@arctrieval.com			
Password	F	Forgot password?	
	LOG IN		

After signing into MyCase, you will see the page to grant third-party application access to your MyCase

account. Click the Allow button, and Arctrieval will establish the connection to your MyCase account, as shown in the image.

my case						
	Authorize Arctrieval					
	Arctrieval test					
	Cases: Write Custom_fields: Write Coustom_fields: Write Expenses: Write Staff: Read					
	Cancel Allow					

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

- Cases Write
- Custom_fields Write
- Expenses Write
- Staff Read

- Contacts Write
- Documents Write
- Notes Write

After allowing Arctrieval access to your MyCase account you are redirected back to Arctrieval. If Arctrieval successfully established the connection with MyCase you will see the following message.

≡ Arctrieval Mortim	Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ~ ③HELP									
🔒 Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations			
Clients					TEST MYCA	SE INTEGRATION	DISABLE MYCASE IN	regration		
Record Requests	MYCASE INTEGRAT	ION								
Contacts	Last Updated On:		05/12/20	25						
Reports										
Forms	Arctrieval Data Type	Arctrieval Field Name		MyCase Custom Field Name	MyCase Custom Fiel	d Type MyCase Custom	n Data Type			
Settings	Client MyCa	se Integration S	Setup			×	l	EDIT		
	Client MyCase integration setup was successful. Connection to the MyCase account was established.						l	EDIT		
	Client					CLOSE		EDIT		
	Client	reisonai kepresentauv	ernstivante		_			EDIT		
	Client	Personal Representativ	e Last Name					EDIT		
	Client	Personal Representativ	e Relationship					EDIT		
	Client	Personal Representativ			EDIT					
	Contact	Department						EDIT		
© 2025 Arctrieval All Rights Reserved.					Rows p	er page: 10 💌 1 – 1	0 of 17 < <	> >		

After you close the MyCase Integration Setup dialog box, you will see the values in the table in red as shown in the image. The next step is to configure Custom Fields in MyCase that Arctrieval uses.

≡ Arctrieval Mortim	■ Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ~ ③HELP								
🏫 Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
🚉 Clients					TEST MYCAS	EINTEGRATION	DISABLE MYCASE IN	TEGRATION	
Record Requests	MYCASE INTEGRA	ΓΙΟΝ							
Contacts	Last Updated On:		05/12/20	25					
Reports									
Forms	Arctrieval Data Type	Arctrieval Field Name		MyCase Custom Field Name	MyCase Custom Field	Type MyCase Custom	Data Type		
Settings	Client	Language Preference						EDIT	
	Client	Last 4 Of SSN						EDIT	
	Client	t Personal Representative First Name						EDIT	
	Client	Personal Representativ	e Last Name					EDIT	
	Client	Personal Representativ	e Relationship					EDIT	
	Client	Personal Representativ	e Relationship Description					EDIT	
	Contact	Department						EDIT	
	Contact	Mailing Address 1						EDIT	
© 2025 Arctrieval All Rights Reserved.					Rows per	rpage: 10 ▼ 1 - 1) of 17 < <	> >	

5. Custom Field Mapping

The custom fields used by Arctrieval must be created in MyCase on the Settings page or you can map the Arctrieval fields to existing fields you may have already created in MyCase. Custom Fields are required for Contacts and Companies.

5.1. Contacts Fields

The following Custom Fields in the table below are required for MyCase Contacts.

Name	Туре	List Options
Aliases	Short Text	
Language Preference	Single Select	English
		Spanish
Last 4 of SSN	Short Text	
Personal Representative First Name	Short Text	
Personal Representative Last Name	Short Text	
Personal Representative Relationship	Single Select	• Parent
		 Legal Guardian
		 Medical Power of Attorney
		• Next of Kin
		• Other
Personal Representative Relationship	Short Text	
Description		

After the information is entered into MyCase, the Custom Fields Contacts section will look like the image below.

📦 mycase	Q Search	New UI	5 FF P2 @ + D								
 Galendar ☐ Tasks ① Cases 	General Dashboard Import/Export Custom Fields	Custom Fields Account Cases / Matters Contacts Companies Time & Expense Manage Contact Custom Fields Manage Contact Custom Fields Settings									
료) Contacts 너스 Reports Modules	Intake Forms Workflows	This is where you can add, edit, delete, and sort Contact custom fields. The fields created here will be available when creating or e	Privacy Policy Terms								
Billing Payments Documents	Leads	Aliases Short Text Language Preference									
 ✓ Documents ✓ ✓ ✓	Personal My Profile My Settings My Notifications	single select - 3 Options $\equiv \frac{Last 4 \text{ Of SSN}}{\text{Short Text}}$									
		Personal Representative First Name Short Text	∕≣								
	Firm Users	Personal Representative Last Name Short Text Personal Representative Relationship	/1								
	Firm Settings Client Billing & Invoice Settings	Single Select - 5 Options	/=								
		Personal Representative Relationship Description Short Text	/1								
🍰 Smart time finder											
My hours billed: 0.0											

5.2. Companies Fields

The following Custom Fields in the table below are required for MyCase Companies.

Name	Туре	List Options
Department	Short Text	
Mailing Address 1	Short Text	
Mailing Address 2	Short Text	
Mailing City	Short Text	
Mailing State	Single Select	List all the States in the United
		States, like AK, AL, AR etc.
Mailing Zip	Short Text	
Mailing Country	Single Select	United States
Mailing Email	Short Text	
Mailing Fax	Short Text	
Mailing Phone	Short Text	

After the information is entered into MyCase, the Custom Fields Contacts section will look like the image below.

📦 mycase	Q Search	New UI 🕚	
 	General Dashboard Import/Export Custom Fields Intake Forms Workflows Case Stages Leads	Custom Fields Cases / Matters Contacts Companies Time & Expense Manage Company Custom Fields This is where you can add, edit, delete, and sort Company custom fields. The fields created here will be available when creating or Department Short Text Mailing Address 1	Account Jared Vishney Jushney@arctrieval.com My profile & contact info Settings Privacy Policy Terms Log out
Documents ● ∨ Image: A communications ∨ Image: A communications ∨ Image: A communications ∨	Personal My Profile My Settings My Notifications	Mailing Address 1 Mailing Address 2 Short Text Mailing City Short Text	/1 /1
	Firm Firm Users Firm Settings	■ Mailing State Single Select - 61 Options ■ Mailing Zip Short Text	/=
	Client Billing & Invoice Settings	Mailing Country Single Select - 2 Options Mailing Email Short Text Mailing Phone	/=
🆚 Smart time finder		Short Text Mailing Fax Short Text Type Style	/1
My hours billed: 0.0			

5.3. Arctrieval Field Mapping

After the Customer Fields are entered into MyCase, they must be mapped to the corresponding field in Arctrieval. This is done by first clicking on the Edit button in a row of the table that is shown in red text to display the Edit MyCase Field Mapping dialog box as shown in the image.

= Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ∽ ⑦HELP									
f Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
Clients					TEST MYCA	SE INTEGRATION	DISABLE MYCASE INTEGRATION		
Record Requests	MYCASE INT	EGRATION							
Contacts	Last Updated	On:	05/12/20	0					
E Reports	E	dit MyCase Field Ma	apping			×			
Forms	Arctrieval					MyCase Custon	n Data Type		
Settings	Client	Arctrieval Data Type:	Client				EDIT		
		Arctrieval Field Name:	Aliases						
	Client	Select the Custom Field to update	the mapping:				EDIT		
	Client	MyCase Custom Field:*				•	EDIT		
	Client	This field is required.					EDIT		
	Client								
	Client				CANCEL	JPDATE	EDIT		
	Client	Personal Representativ	e Relationship				EDIT		
	Client	Personal Representativ	e Relationship Description				EDIT		

Click on on the MyCase Customer Field drop-down to display the list of Custom Fields and select the field that you want to map from MyCase to Arctrieval. In the example below, the Aliases field entered into MyCase will be mapped to the Aliases field in Arctrieval.

= Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ∽ ③HELP								
f Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations	
Clients					TEST MYCA	SE INTEGRATION	DISABLE MYCASE INT	EGRATION
Record Requests	MYCASE INTEG	GRATION						
Contacts	Last Updated On:		05/12/20	25				
Reports	Edi	t MyCase Field Ma	apping			×		
Forms	Arctrieval					MyCase Custom	Data Type	
Settings	Client	Arctrieval Data Type:	Client				1	EDIT
	Client	Arctrieval Field Name:	Aliases				1	EDIT
	Sel	lect the Custom Field to update	the mapping:					
	Client	MyCase Custom Field.*		<u> </u>		EDIT		
	Client	Personal Representative La	EDIT					
	Chem	Personal Representative Relationship						
	Client	Last 4 Of SSN				ED		
		Custom Number						
	Client	Personal Representative Relationship Description						EDIT
	Client	Client Alfases						EDIT
	Contact	Department					l	EDIT
© 2025 Arctrieval All Rights Reserved.					Rows	ber page: 10 1 − 10	0 of 17 < <	> >

≡ Arctrieval Mortim	rieval Mortimer & Duke (MyCase Demo) Randolph Duke ~ @HELF								
A Dashboard	U	sers	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations	
Clients						TEST MYCA	ASE INTEGRATION	DISABLE MYCASE INT	EGRATION
Record Requests	MYCASE	E INTEGRAT	ION						
Contacts	Last Upda	ated On:		05/12/20	25				
Reports	Annahirmat	Edit N	lyCase Field N	lapping			×	Data Tura	
Forms	Arctrieval		,	11 3			MyCase Custon	i Data Type	
Settings	Client	Arctri	ieval Data Type:	Client				1	EDIT
	Client	Arctri Select t	ieval Field Name: he Custom Field to upda	Aliases te the mapping:				l	EDIT
	Client	MyCase Aliases	Custom Field:*				•	1	EDIT
	Client						IDDATE	l	EDIT
	Client					CANCEL		l	EDIT
	Client		Personal Representat	ive Relationship				1	EDIT
	Client		Personal Representat	ive Relationship Description				1	EDIT

After selecting the field, click the Update button as shown:

The field values are then populated in Arctrieval, and the text color changes from red to black as shown.

Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ~								HELP
Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations	
Clients					TEST MYCA	ASE INTEGRATION	DISABLE MYCASE INTEGI	RATION
Record Requests	MYCASE INTEGRAT	ION						
Contacts	Last Updated On:		05/12/20	25				
Reports								
Forms	Arctrieval Data Type	Arctrieval Field Name		MyCase Custom Field Name	MyCase Custom Fie	ld Type MyCase Custom	Data Type	
Settings	Client	Aliases		Aliases	Short Text	People	E	DIT
	Client	Language Preference						DIT
	Client	Last 4 Of SSN					E	DIT
	Client	Personal Representative	e First Name				E	DIT
	Client	Personal Representative	e Last Name				E	DIT

Repeat the process for all remaining fields in Arctrieval. When all the fields are correctly mapped, the following message is displayed.

Update MyCase Field Mapping	×
The mapping is set up correctly, you can start using the integration with the current settings.	
	CLOSE

6. Integration Testing

To verify the MyCase integration settings, click the Test MyCase Integration button as shown.

■ Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ∨ ⑦HELP								
♠ Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations	
🚓 Clients					TEST MYCA	ASE INTEGRATION D	ISABLE MYCASE INTEG	RATION
Record Requests	MYCASE INTEGR	ATION						
Contacts	Last Updated On:		05/12/20	25				
Reports	Arctriaval Data				MuCaea	Sustan Eiald MuCasa Cu	retom Data	
Forms	Туре	Arctrieval Field Name	M	Case Custom Field Name	T	ype Ty	pe	
Settings	Contact	Mailing Address 2	М	ailing Address 2	Short Tex	t Company	E	DIT
	Contact	Mailing City	М	ailing City	Short Tex	t Company	E	DIT
	Contact	Mailing Country	М	ailing Country	List	Company	E	DIT

Arctrieval will attempt to verify the connection and the custom field mapping.

6.1. Connection Verified

If the connection is established and the custom field mapping is correct, the following message is displayed.

MyCase Link Status	×
MyCase link was verified. Connection to the MyCase account was established.	
	CLOSE

6.2. Connection Issue

If there are any issues, a message similar to the following that lists the issues is displayed.

MyCase Link Status	3	×
MyCase link could not be verified Please check the details of the	ed. Connection to the MyCase account was established, but errors occurred during setup. errors and correct them.	
Duplicated Fields:	Last 4 Of SSN (Field in MyCase: Last 4 Of SSN), Personal Representative Relationship Description (Field in MyCase: Last 4 Of SSN)	
Personal Representative Relationship:	The field type is incorrect. Required field type: List.	
	CLO	SE

7. Disable MyCase Integration

To disable the Arctrieval integration with Arctrieval, click on the Disable MyCase integration button to display the Disable MyCase Integration dialogue box as shown.

■ Arctrieval Mortimer & Duke (MyCase Demo) Randolph Duke ~ ⑦HELP								
🏫 Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document	Templates Int	tegrations
🚓 Clients					TEST MYC	ASE INTEGRATIO	DN DISABLE M	IYCASE INTEGRATION
Record Requests	MYCASE INTEGRATI	ON						1
Contacts	Last Updated On:		05/12/20	25				
Reports	Arctrieval Data				MuCasa	Custom Eiold	MyCase Custom Data	
Forms	Disable	e MyCase Integ	gration 🖌			×	Туре	
Settings	Contact Are you s	sure you want to remove	he link to MvCase from A	ctrieval? Removing the MyCase	link will break the integra	ation	Company	EDIT
	Contact To disable	between MyCase and Arctrieval. Contact To disable MyCase Integration, type the word disable:						EDIT
	Contact					_	Company	EDIT
	Contact				CANCEL	DISABLE	Company	EDIT
	Contact M	Mailing Fax	М	ailing Fax	Short Te	ĸt	Company	EDIT
	Contact M	Mailing Phone	М	ailing Phone	Short Te:	ĸt	Company	EDIT
	Contact M	Mailing State	м	ailing State	List		Company	EDIT
	Contact M	Mailing Zip	м	ailing Zip	Short Tex	ct	Company	EDIT
© 2025 Arctrieval All Rights Reserved.					Rows	per page: 25	✓ 1 – 17 of 17	

Enter "disable" to proceed and press the Disable button, as shown below.

Disable MyCase Integration	×
Are you sure you want to remove the link to MyCase from Arctrieval? Removing the MyCase link will break the integration between MyCase and Arctrieval. To disable MyCase Integration, type the word disable :	
disable	
	BLE

Arctrieval then prompts you to confirm disabling the integration. To proceed, click the Disable Integration button as shown.

Confirm MyCase Link Removal	×
Press Disable Integration to remove the MyCase link information from Arctrieval. Press Cancel to stop the process. Removing the MyCase link will break the integration between MyCase and Arctrieval.	
CANCEL DISABLE INTEGRA	TION

After the integration is disabled, the following message is displayed.

Disable MyCase Integration	×
The MyCase connection was disabled.	
	CLOSE

8. Company Mailing State Field Values

Below is a list of the State abbreviations that must be entered into the Custom Field List options for Mailing State.

1.	АК	21.	MD	41.	SC
2.	AL	22.	ME	42.	SD
3.	AR	23.	MI	43	TN
4.	AZ	24.	MN	44.	ТХ
5.	CA	25.	MO	45.	UT
6.	CO	26.	MS	46.	VA
7.	СТ	27.	MT	47.	VT
8.	DC	28.	NC	48.	WA
9.	DE	29.	ND	49.	WI
10.	FL	30.	NE	50.	WV
11.	GA	31.	NH	51.	WY
12.	HI	32.	NJ	52.	AA
13.	IA	33.	NM	53.	AE
14.	ID	34.	NV	54.	AP
15.	IL	35.	NY	55.	AS
16.	IN	36.	ОН	56.	FM
17.	KS	37.	ОК	57.	GU
18.	КҮ	38.	OR	58.	MH
19.	LA	39.	PA	59.	MP
20.	MA	40.	RI	60.	PR
				61.	VI