



Arctrieval <> MyCase Integration Setup Guide

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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 Company 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

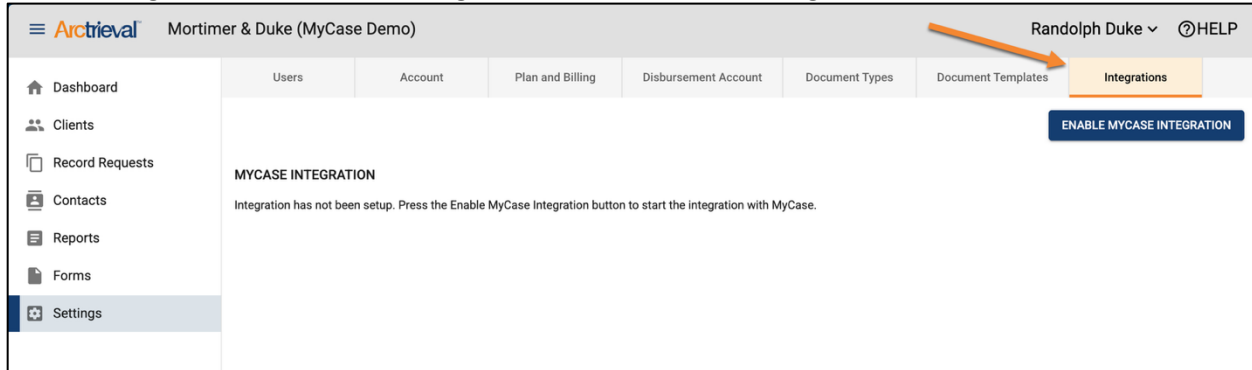
The MyCase user setting up the integration with Arctrieval must have the “Manage your firm's preferences, billing, and payment options?” role/permission enabled.

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.

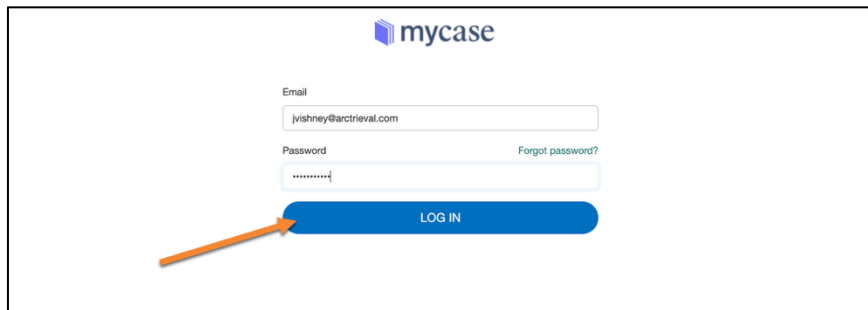


Clicking the Enable MyCase Integration button will redirect you to the MyCase application, where you must approve Arctrieval's access to your MyCase account, as shown in the image.



If the MyCase Integration is active in your Arctrieval account, the Arctrieval Matter tab is removed from the left-hand menu to avoid user confusion.

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



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.



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

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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.

The screenshot shows the Arctrieval interface with the 'Integrations' tab selected. A modal dialog titled 'MyCase Integration Setup' is open, displaying the message: 'MyCase integration setup was successful. Connection to the MyCase account was established.' The dialog has a 'CLOSE' button. In the background, a table lists various data types and their corresponding field names, with some fields highlighted in red. The table includes columns for 'Arctrieval Data Type', 'Arctrieval Field Name', 'MyCase Custom Field Name', 'MyCase Custom Field Type', and 'MyCase Custom Data Type'. The table is currently empty, and the 'EDIT' button is visible for each row.

Arctrieval Data Type	Arctrieval Field Name	MyCase Custom Field Name	MyCase Custom Field Type	MyCase Custom Data Type
Client				
Client				
Client				
Client				
Client				
Client				
Client				
Client				
Contact				

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.

The screenshot shows the Arctrieval interface with the 'Integrations' tab selected. The 'MyCase Integration Setup' dialog box is closed. The table now displays the following data, with the field names highlighted in red:

Arctrieval Data Type	Arctrieval Field Name	MyCase Custom Field Name	MyCase Custom Field Type	MyCase Custom Data Type
Client	Language Preference			
Client	Last 4 Of SSN			
Client	Personal Representative First Name			
Client	Personal Representative Last Name			
Client	Personal Representative Relationship			
Client	Personal Representative Relationship Description			
Contact	Department			
Contact	Mailing Address 1			

5. Custom Field Mapping

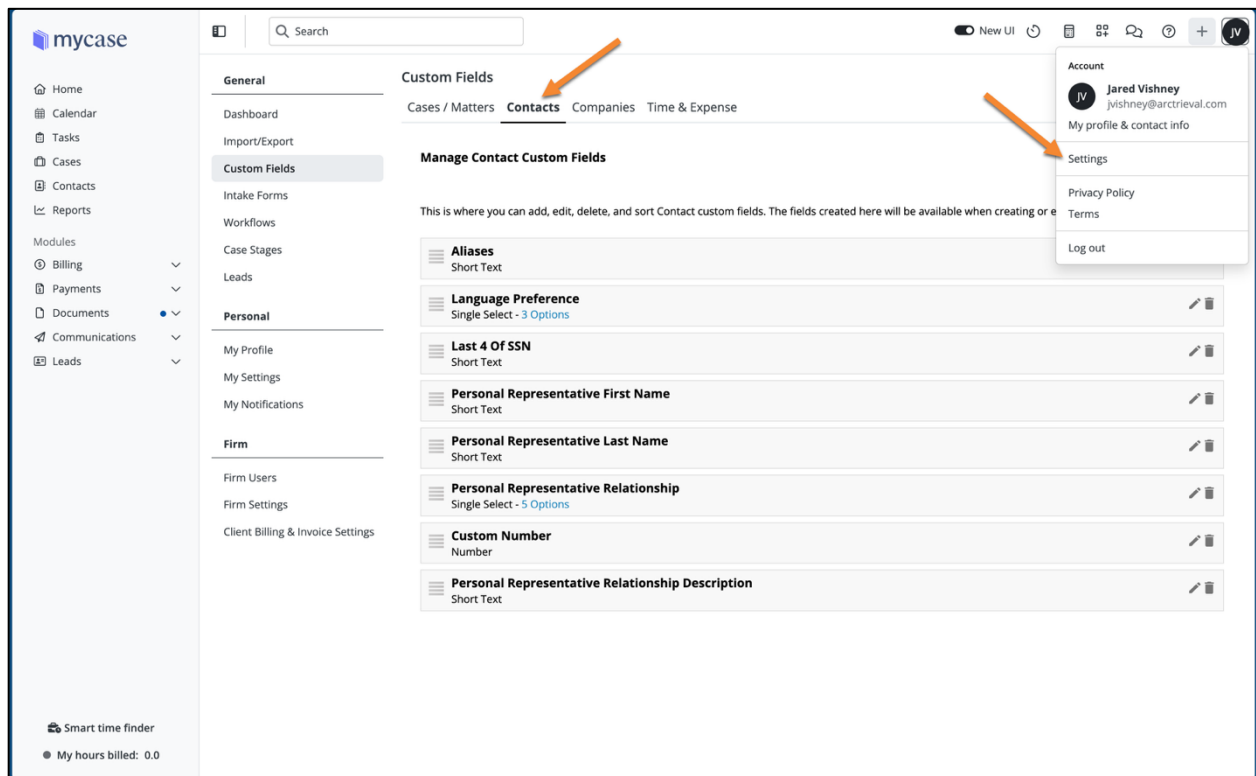
The custom fields used by Arctrievall must be created in MyCase on the Settings page or you can map the Arctrievall fields to existing fields you may have already created in MyCase. Custom Fields are required for Contacts and Companies.

5.1. Contacts Fields

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

Name	Type	List Options
Aliases	Short Text	
Language Preference	Single Select	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Parent Legal Guardian Medical Power of Attorney Next of Kin Other
Personal Representative Relationship Description	Short Text	

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

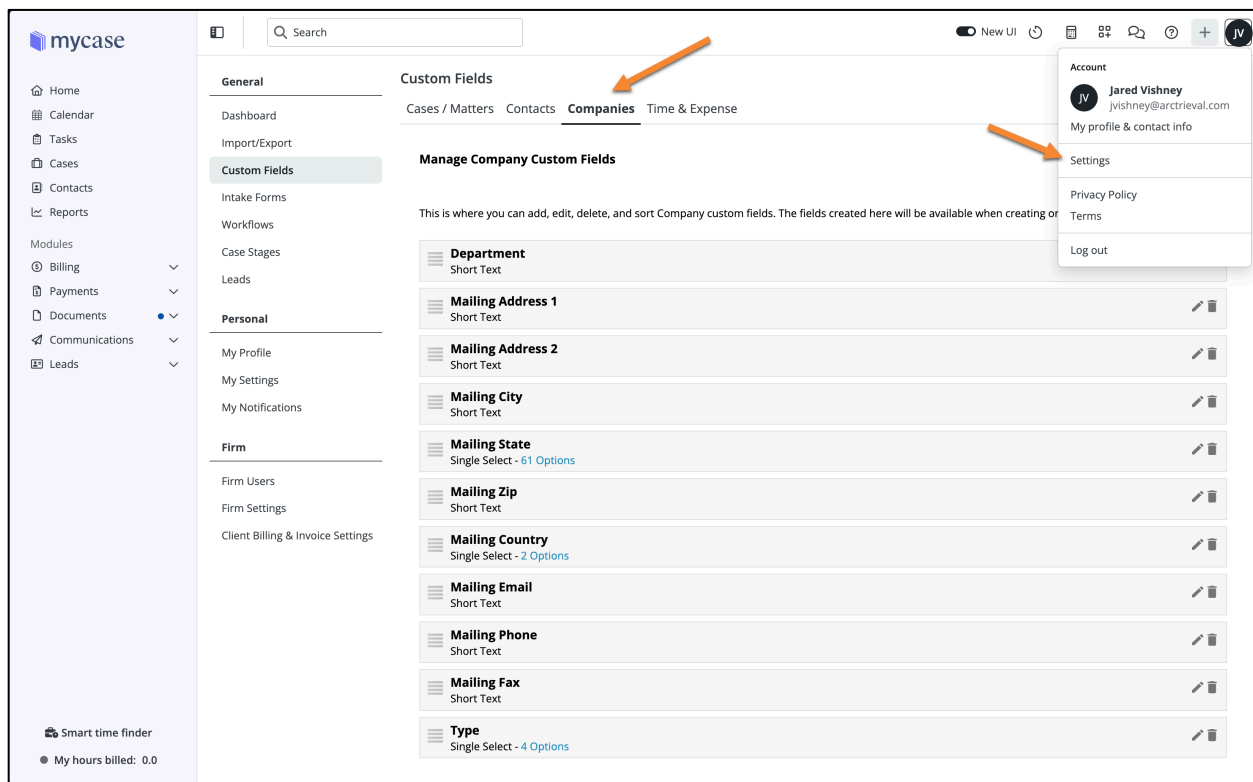


5.2. Companies Fields

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

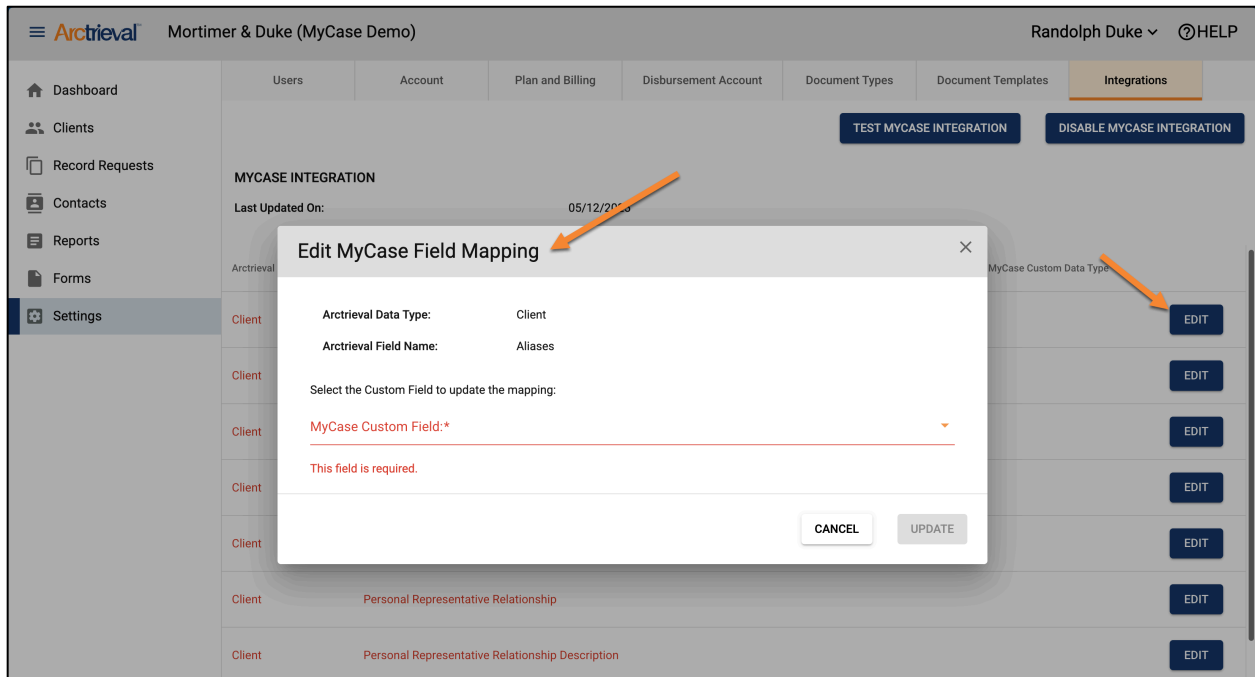
Name	Type	List Options
Department	Short Text	
Mailing Address 1	Short Text	
Mailing Address 2	Short Text	
Mailing City	Short Text	
Mailing State	Single Select	List all the States in the United States, like AK, AL, AR etc.
Mailing Zip	Short Text	
Mailing Country	Single Select	United States
Mailing Email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

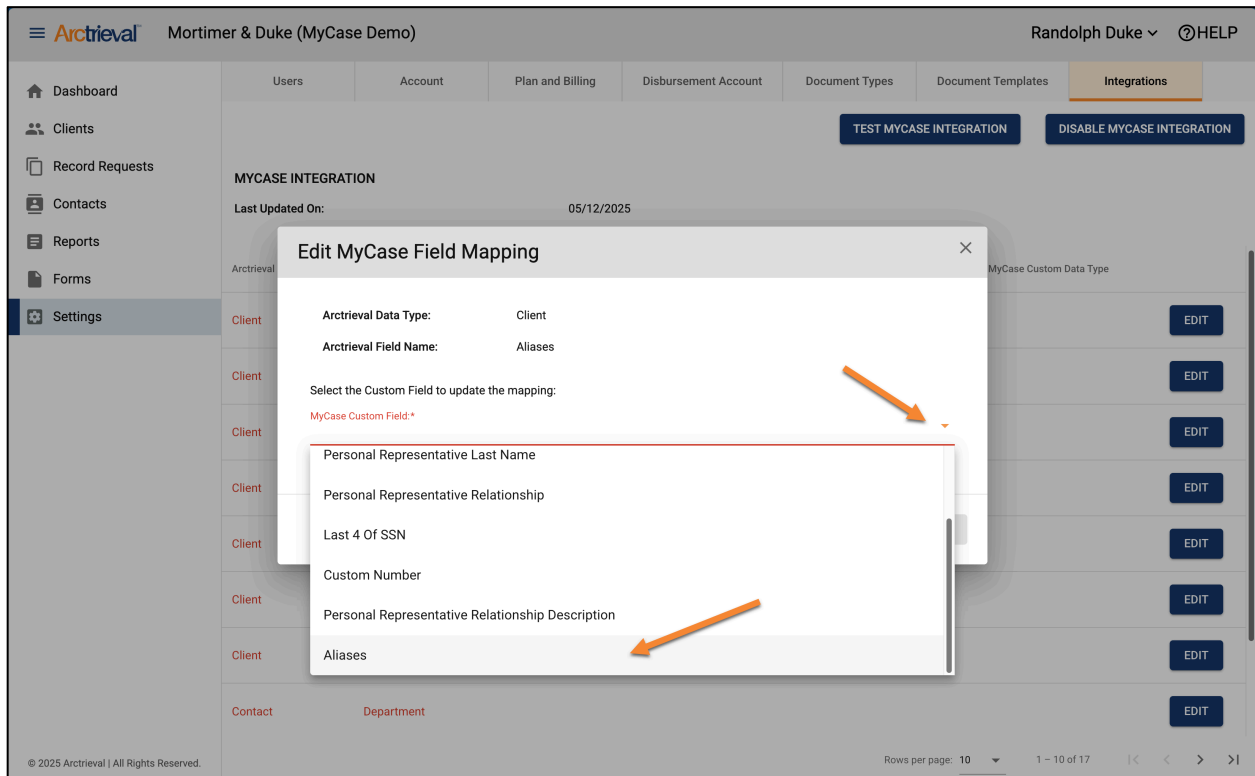


5.3. Arctrieval Field Mapping

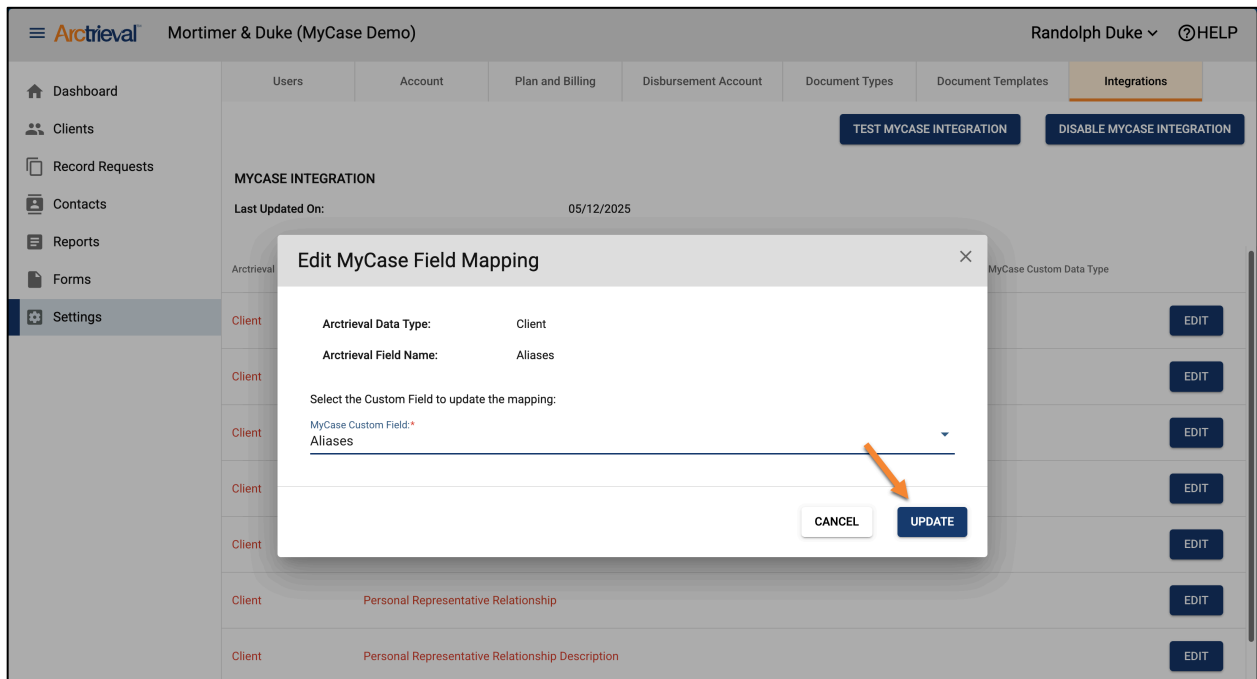
After the Customer Fields are entered into MyCase, they must be mapped to the corresponding field in Arctrieval. This is done by first clicking on the Edit button in a row of the table that is shown in red text to display the Edit MyCase Field Mapping dialog box as shown in the image.



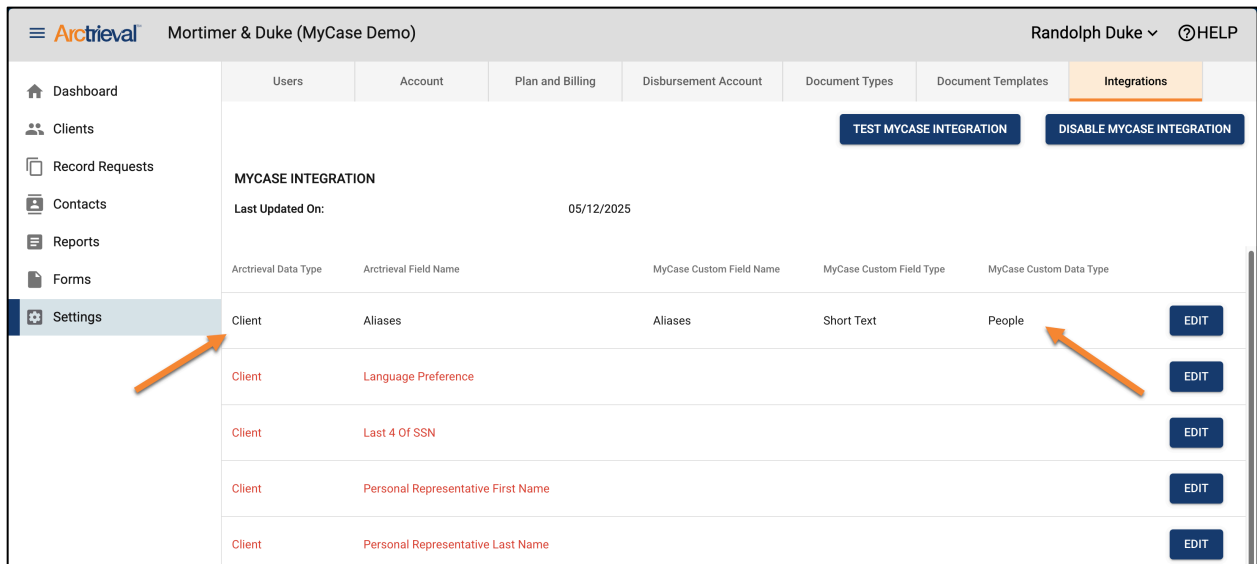
Click on on the MyCase Customer Field drop-down to display the list of Custom Fields and select the field that you want to map from MyCase to Arctrieval. In the example below, the Aliases field entered into MyCase will be mapped to the Aliases field in Arctrieval.



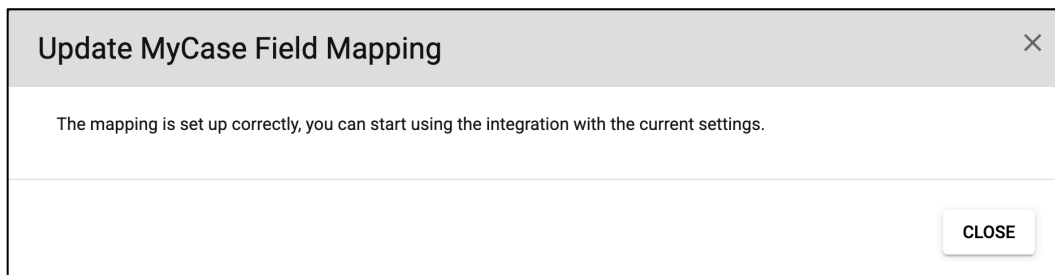
After selecting the field, click the Update button as shown:



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



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



6. Integration Testing

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

The screenshot shows the Arctriever interface for a user named Mortimer & Duke (MyCase Demo). The top navigation bar includes a sidebar with links to Dashboard, Clients, Record Requests, Contacts, Reports, Forms, and Settings. The main content area has tabs for Users, Account, Plan and Billing, Disbursement Account, Document Types, Document Templates, and Integrations. The Integrations tab is active, displaying the MyCase Integration settings. A table lists the mapping between Arctriever Data Types and MyCase Custom Fields. An orange arrow points to the 'TEST MYCASE INTEGRATION' button.

Arctriever Data Type	Arctriever Field Name	MyCase Custom Field Name	MyCase Custom Field Type	MyCase Custom Data Type	
Contact	Mailing Address 2	Mailing Address 2	Short Text	Company	EDIT
Contact	Mailing City	Mailing City	Short Text	Company	EDIT
Contact	Mailing Country	Mailing Country	List	Company	EDIT

Arctriever 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.

The dialog box titled 'MyCase Link Status' displays the message: 'MyCase link was verified. Connection to the MyCase account was established.' A 'CLOSE' button is located at the bottom right.

6.2. Connection Issue

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

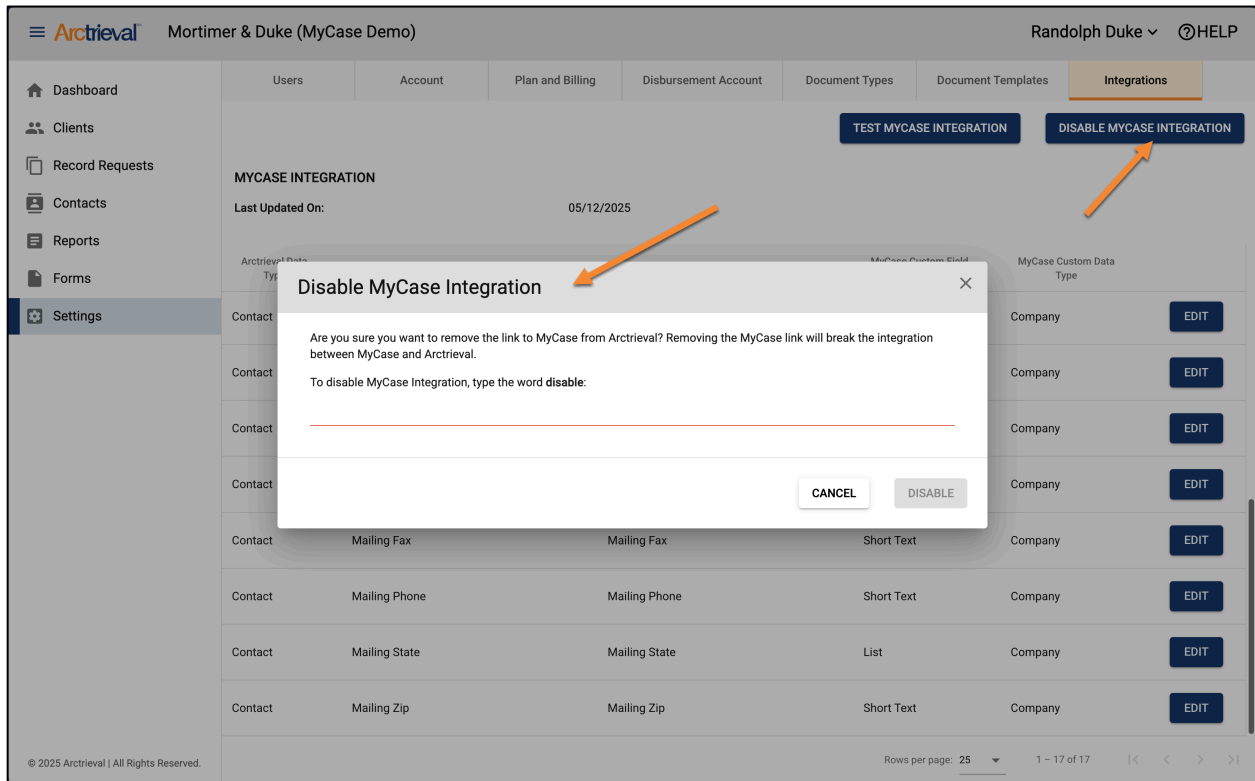
The dialog box titled 'MyCase Link Status' displays the message: 'MyCase link could not be verified. Connection to the MyCase account was established, but errors occurred during setup. Please check the details of the errors and correct them.' Below the message, two error details are listed:

- 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.

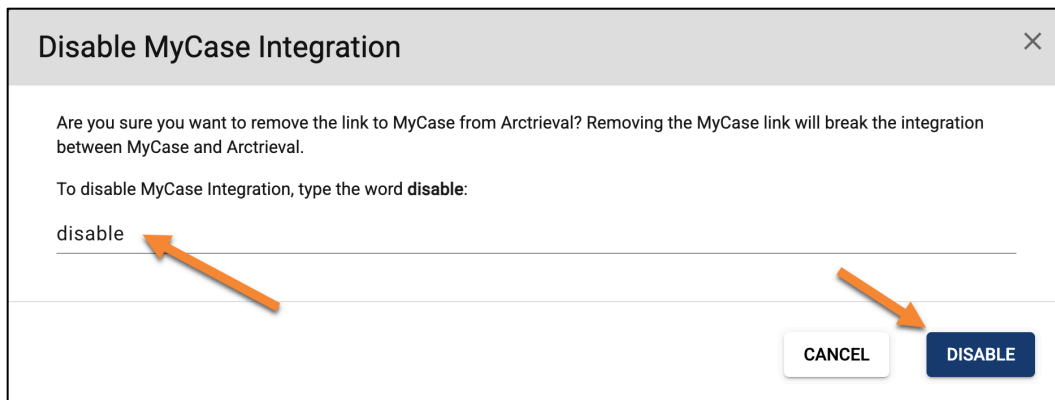
A 'CLOSE' button is located at the bottom right.

7. Disable MyCase Integration

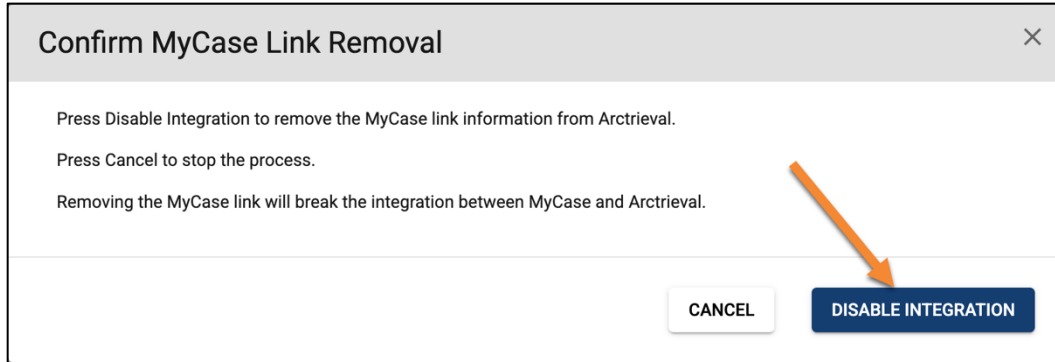
To disable the Arctrieval integration with Arctrieval, click on the Disable MyCase integration button to display the Disable MyCase Integration dialogue box as shown.



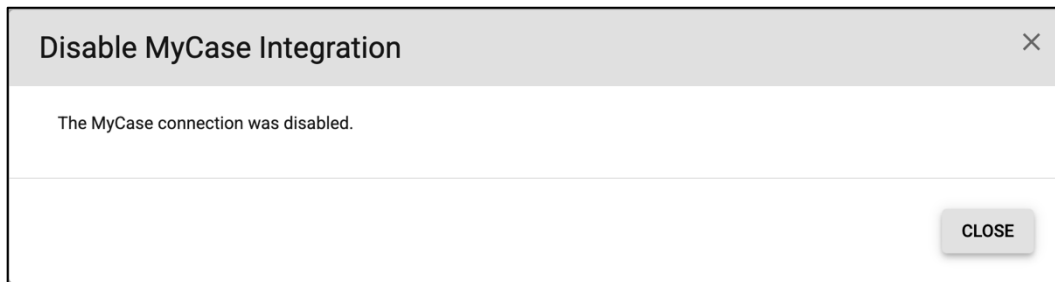
Enter “disable” to proceed and press the Disable button, as shown below.



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



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



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. AK	21. MD	41. SC
2. AL	22. ME	42. SD
3. AR	23. MI	43. TN
4. AZ	24. MN	44. TX
5. CA	25. MO	45. UT
6. CO	26. MS	46. VA
7. CT	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. OH	56. FM
17. KS	37. OK	57. GU
18. KY	38. OR	58. MH
19. LA	39. PA	59. MP
20. MA	40. RI	60. PR
		61. VI