



Arctrieval Legal
Arctrieval <> SmartAdvocate Integration Setup Guide

December 3, 2024
Document Version 1.4

Confidential Document
Do Not Distribute Without Permission

Table of Contents

1.	Introduction.....	3
2.	Document Change History.....	3
3.	Arctrieval Configuration	3
3.1.	Establishing the Link Between SmartAdvocate and Arctrieval.....	4
3.2.	Test SmartAdvocate Link	5
3.3.	Update SmartAdvocate API Key	6
3.4.	Remove SmartAdvocate API Key	6
4.	SmartAdvocate Configuration	8
4.1.	Document Categories - Picklist Maintenance.....	8
4.2.	Document Sub-Categories – Picklist Maintenance.....	8
4.3.	Medical Provider Records Request – Picklist Maintenance	10
4.4.	Medical Record Request Types	11
4.5.	System Parameters.....	13
5.	Additional SmartAdvocate Integration Notes	15

1. Introduction

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

Arctrieval's integration with SmartAdvocate provides additional functionality and features that improve the workflow for mutual SmartAdvocate and Arctrieval customers and the user experience.

Arctrieval's integration offers critical functionality in the following areas.

1. Submit Record Requests from SmartAdvocate to Arctrieval
 - a. Any SmartAdvocate User can create a medical request in SmartAdvocate, which the attorney's medical record team in Arctrieval will process.
 - b. Arctrieval automatically checks for new medical requests in SmartAdvocate every two hours, or the attorney's medical record team can retrieve requests from SmartAdvocate on demand.
 - c. Medical requests are reviewed by the medical record team in Arctrieval, updated as needed, and then sent to the healthcare provider or facility.
 - d. After being released for delivery to the healthcare provider or facility, Arctrieval's automated processes and workflows take over.
 - e. All activities, events, and documents in Arctrieval are recorded in SmartAdvocate as part of the medical request.
2. Link existing Arctrieval Requests to an existing SmartAdvocate Project

2. Document Change History

Date	Document Revision	Description of Changes
11/15/20223	1.0	Initial Document.
4/23/2024	1.1	Updated images when removing the key, added information about URL to use and provided tips on SmartAdvocate user name convention.
7/30/2204	1.2	Add Arctrieval – Invoice Disputed to Medical Provider Records Request Picklist
8/16/2024	1.3	Clarified System Parameter settings. Added Invoice Disputed.
12/3/2024	1.4	Note about API Access for the Admin User

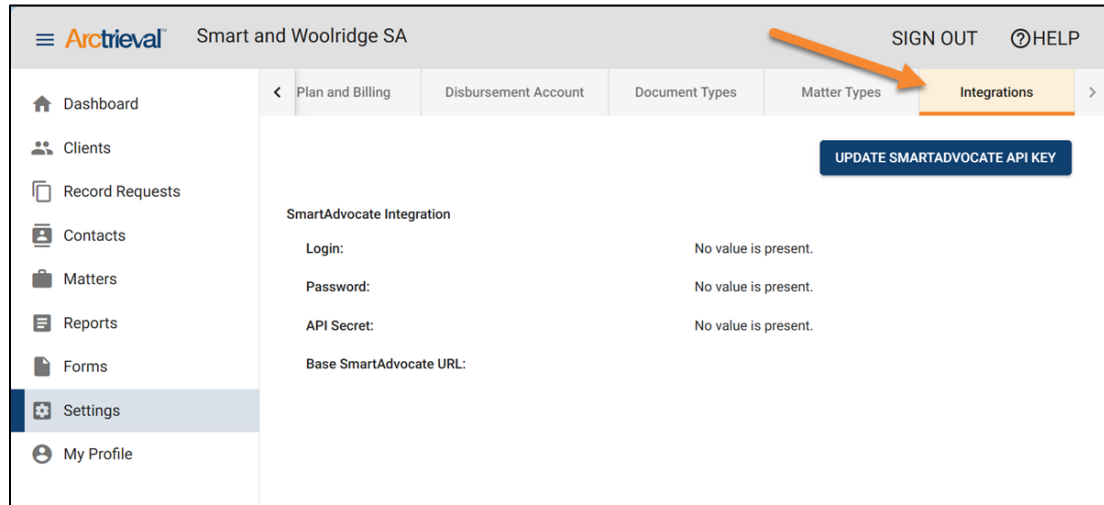
3. Arctrieval Configuration

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

1. Upon request, Arctrieval will activate the Integrations tab in the Arctrieval Settings for a firm with a multiple-user account subscription. The SmartAdvocate integration feature is only available to firms with a subscription for multiple users. Arctrieval charges no other fees related to the integration. Please get in touch with Arctrieval to activate the feature.
2. A SmartAdvocate User Login, Password, Client Key, and Base URL must be added to the Arctrieval account.
3. Firms must contact their SmartAdvocate sales representative to set up the integration within SmartAdvocate. SmartAdvocate charges a fee to set up the integration.
4. Required Arctrieval data fields must be added to SmartAdvocate Picklists, Medical Record Request Type, and System Parameters.

3.1. Establishing the Link Between SmartAdvocate and Arctrieval

Once the SmartAdvocate 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 Update SmartAdvocate API Key button displays the dialog box in the image.

As shown in the image, SmartAdvocate User Login, Password, Client Key, and Base URL must be added to the Arctrieval account. The Client Key and SmartAdvocate Base URL are available from SmartAdvocate.

Firms must contact their SmartAdvocate sales representative to get the information and the integration set up within the SmartAdvocate account.

Update SmartAdvocate Integration Information

SmartAdvocate Login: *

Enter SmartAdvocate Login

This field is required!

SmartAdvocate Password: *

SmartAdvocate Client Key: *

Note: All info above are stored in an encrypted format. The keys are used only within Arctrieval and not shared with any other service.

Base URL: *

Note: Arctrieval uses the Smart Advocate Base URL to access your Smart Advocate data. It is a required field.

Default base URL is:

https://app.smartadvocate.com/.

If you or your organization is using your own instance of Smart Advocate the base Url is different.

Usually it is something like this:

https://arctrieval.smartadvocate.com/.

If you have any issues determining your Smart Advocate Base URL, contact your Smart Advocate system administrator or Smart Advocate support.

CANCEL

SAVE CHANGES



The SmartAdvocate Client Key and Base URL are provided by SmartAdvocate as part of setting up the integration within the SmartAdvocate application and are specific to your company. You must contact SmartAdvocate to get this information. There may be a fee charged by SmartAdvocate to set up the integration within your SmartAdvocate account.

The data must be entered as follows:

1. SmartAdvocate Login is the User Name of a SmartAdvocate administrator in your firm.
2. The SmartAdvocate Password is the password of the SmartAdvocate administrator in your firm, as shown in item 1.
3. SmartAdvocate Client Key is provided to you by SmartAdvocate.
4. SmartAdvocate provides the base URL for your firm.



If your SmartAdvocate Login has a “.com” at the end, remove it from the value entered as your SmartAdvocate Login.

After entering the information and confirmation, the information on the tab will be updated, and the first setup step will be completed.

The web page shown in the image is displayed after entering the correct User Name, Password, Client Key, and Base URL for your SmartAdvocate account and clicking the Save Changes button.

Arctriever Smart and Woolridge SA

SIGN OUT HELP

Users Account Plan and Billing Disbursement Account Document Types

UPDATE SMARTADVOCATE API KEY TEST SMARTADVOCATE LINK REMOVE API KEY

SmartAdvocate Integration

Login: [redacted]

Password: [redacted]

API Secret: [redacted]

Base SmartAdvocate URL: [redacted]

Last Updated On: 11/12/2023

You can verify that the information is correct by clicking the Test SmartAdvocate Link button.

3.2. Test SmartAdvocate Link

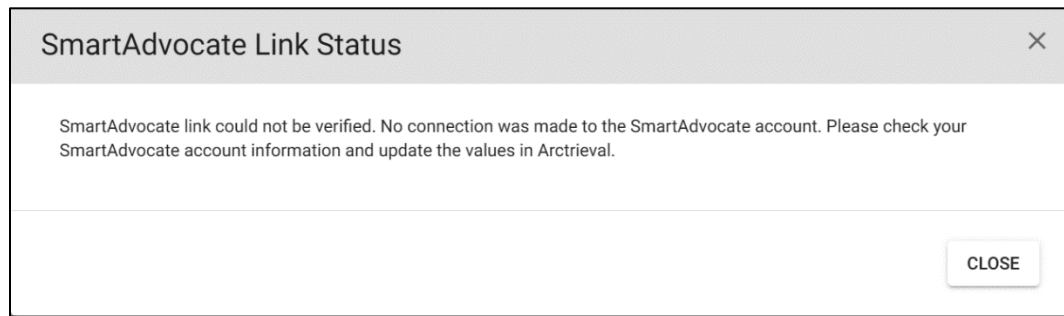
Clicking the Test SmartAdvocate Link button verifies that Arctriever can communicate with the SmartAdvocate account based on the provided User name, Password, Client Key, and SmartAdvocate Base URL. If the test is successful, the dialog box is displayed, as shown in the image.

SmartAdvocate Link Status

SmartAdvocate link was verified. Connection to the SmartAdvocate account was established.

CLOSE

If the test fails, as shown in the image, please start troubleshooting the issue by updating the User name, Password, Client Key, and SmartAdvocate Base URL.

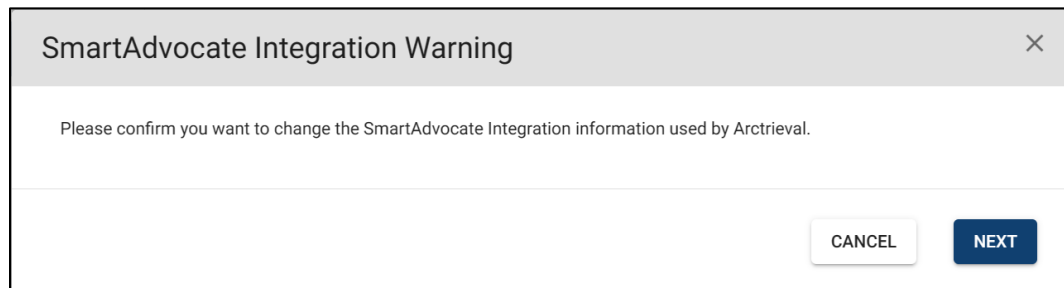


3.3. Update SmartAdvocate API Key

If a valid connection between SmartAdvocate and Arctriever exists, clicking the Update SmartAdvocate API Key

button displays the dialog box in the image.

Clicking the Next button displays the Update



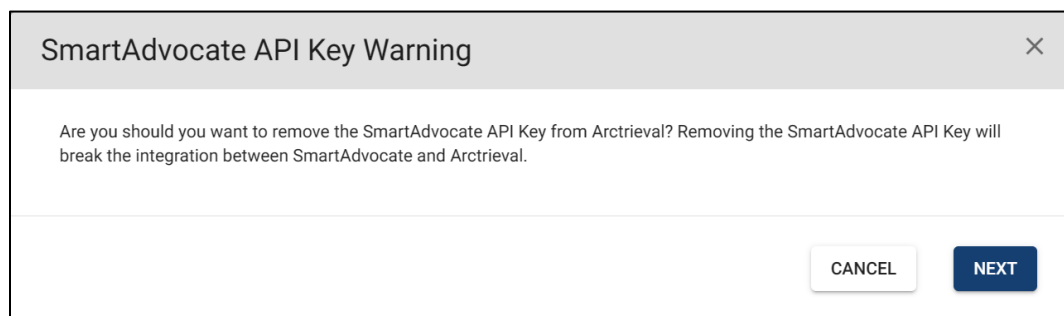
SmartAdvocate API Key dialog box. This functionality should only be used if the original values were incorrect when the link between SmartAdvocate and Arctriever was first established or if the SmartAdvocate account is migrating to a new instance.

Updating the SmartAdvocate API Key requires that all values are re-entered. It is not possible to update only one value.

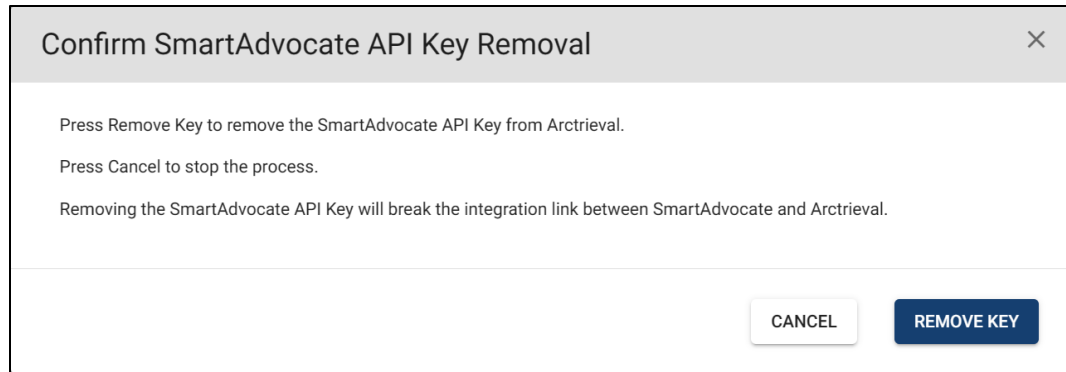
3.4. Remove SmartAdvocate API Key

Clicking the Remove SmartAdvocate API Key button displays the SmartAdvocate API Key Warning dialog box, as

shown in the image.



To continue, press the Next button, which will display the Confirm SmartAdvocate API Key Removal dialog box, as shown in the image.



The Remove Key button will remove the integration link between SmartAdvocate and Arctrieval.

4. SmartAdvocate Configuration

To properly move data between SmartAdvocate and Arctrieval, values must be added to SmartAdvocate Picklists, Medical Record Request Type, and System Parameters. The Firm SmartAdvocate Administrator adds the necessary information and modifies the SmartAdvocate Account.

4.1. Document Categories - Picklist Maintenance

From the Admin drop-down menu in SmartAdvocate, select Picklist Maintenance and select Document Categories from the list. Click the Add New Item button to display the dialog box in the image.

Enter Arctrieval as the Category value and click the Update button.

The screenshot shows a dialog box titled "Edit Form" with a close button (X) in the top right corner. Inside the dialog, there are four input fields: "Category:" with the value "Arctrieval", "Associated Time (in minutes):" which is empty, "Activity Code:" which is empty, and "Time Tracking:" which is empty. At the bottom right of the dialog, there are two buttons: "UPDATE" and "CANCEL".

4.2. Document Sub-Categories – Picklist Maintenance

From the Admin drop-down menu in SmartAdvocate, select Picklist Maintenance and select Document Sub-Categories from the list. You must add all the document types used in Arctrieval to the Document Sub-Categories list. Click the Add New Item button to display the dialog box shown in the image, and add each document type to the Arctrieval Category.

The screenshot shows a dialog box titled "Edit Form" with a close button (X) in the top right corner. Inside the dialog, there are five input fields: "Sub-Category:" with the value "_Intake Form", "Category:" with the value "Arctrieval", "Associated Time (in minutes):" which is empty, "Activity Code:" which is empty, and "Time Tracking:" which is empty. At the bottom right of the dialog, there are two buttons: "UPDATE" and "CANCEL".

The following Document Sub-Categories values must be added:

Item	Sub-Category Value	Category Value
1.	_Intake Form	Arctrieval
2.	_Patient's Photo ID	Arctrieval
3.	_Relationship Documentation	Arctrieval
4.	_Representative's Photo ID	Arctrieval
5.	Billing Records	Arctrieval
6.	Certificate of No Records	Arctrieval
7.	Correspondence Letter	Arctrieval
8.	Custodian of Record Affidavit	Arctrieval

Item	Sub-Category Value	Category Value
9.	Imaging Studies	Arctrieval
10.	Invoice	Arctrieval
11.	Medical Records	Arctrieval
12.	Other	Arctrieval
13.	Rejection Notice or Letter	Arctrieval
14.	Request	Arctrieval



If any values are not added or contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be entered exactly as shown.

When completed, the Document Sub-Category Picklist must have 14 entries, and Arctrieval must be used to filter the Category, as shown in the image.

ADD NEW ITEM		Picklist Maintenance				Export			
Sub-Category	Category	Associated Time (in minutes)	Activity Code	Time Tracking	Action				
	Arctrieval								
_Intake Form	Arctrieval								
_Patient's Photo ID	Arctrieval								
_Relationship Documentation	Arctrieval								
_Representative's Photo ID	Arctrieval								
Billing Records	Arctrieval								
Certificate of No Records	Arctrieval								
Correspondence Letter	Arctrieval								
Custodian of Record Affidavit	Arctrieval								
Imaging Studies	Arctrieval								
Invoice	Arctrieval								
Medical Records	Arctrieval								
Other	Arctrieval								
Rejection Notice or Letter	Arctrieval								
Request	Arctrieval								



If any values are not added or contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be entered exactly as shown.

4.3. Medical Provider Records Request – Picklist Maintenance

From the Admin drop-down menu in SmartAdvocate, select Picklist Maintenance and select Medical Provider Records Request from the list. You must add all the status types used in Arctrieval to the

Medical
Provider
Records
Request list.
Click the Add
New Item
button to
display the
dialog box in
the image.

The screenshot shows a dialog box titled 'Edit Form' with a close button (X) in the top right corner. Inside the dialog, there are two input fields: 'Status:' and 'Description:'. The 'Status:' field contains the text 'Arctrieval - Canceled'. The 'Description:' field is empty. At the bottom right of the dialog, there are two buttons: 'UPDATE' and 'CANCEL'.

The following Medical Provider Records Request values must be added:

Item	Status	Description (Optional)
1.	Arctrieval - Canceled	
2.	Arctrieval - Completed	
3.	Arctrieval - Completed-No Records	
4.	Arctrieval - Deleted	
5.	Arctrieval - Delivery Issue	
6.	Arctrieval - Incomplete	
7.	Arctrieval - Invalid Data	
8.	Arctrieval - Invoice Disputed	
9.	Arctrieval - Invoice Paid	
10.	Arctrieval - Invoice Received	
11.	Arctrieval - Need To Cancel	
12.	Arctrieval - No Records	
13.	Arctrieval - Open	
14.	Arctrieval - Past Due	
15.	Arctrieval - Pickup	
16.	Arctrieval - Progress	
17.	Arctrieval - Rejected	
18.	Arctrieval - Request Sent to Contact	
19.	Arctrieval - Saved as Draft	



If any Status values are not added or contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be entered exactly as shown.

When completed, the Medical Provider Records Request Picklist must have 19 entries, and Arctrieval must be used to filter the Category, as shown in the image.

Picklist Maintenance			Export
Status	Description	Action	
Arctrieval			
Arctrieval - Canceled			
Arctrieval - Completed			
Arctrieval - Completed-No Records			
Arctrieval - Deleted			
Arctrieval - Delivery Issue			
Arctrieval - Incomplete			
Arctrieval - Invalid Data			
Arctrieval - Invoice Disputed			
Arctrieval - Invoice Paid			
Arctrieval - Invoice Received			
Arctrieval - Need To Cancel			
Arctrieval - No Records			
Arctrieval - Open			
Arctrieval - Past Due			
Arctrieval - Pickup			
Arctrieval - Progress			
Arctrieval - Rejected			
Arctrieval - Request Sent to Contact			
Arctrieval - Saved as Draft			



If any Status values are not added or contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be entered exactly as shown.

Medical Record Request Types

From the Admin drop-down menu in SmartAdvocate, select Medical Record Request Types from the list. You must add all the types used in Arctrieval to the Medical Records Request Type list. Click the Add New Records Type button to display the dialog box in the image.

Edit Form

Record Type:*
Arctrieval | Patient to 3rd Party | Billing Record

Case Types:
(All Case Types)

Case Groups:
(All Case Groups)

Template:

SAVE
CANCEL

The following Medical Record Request Type values must be added:

Item	Record Type
1.	Arctrieval Patient to 3rd Party Billing Record
2.	Arctrieval Patient to 3rd Party Imaging Study
3.	Arctrieval Patient to 3rd Party Medical Record
4.	Arctrieval Patient to Self Billing Records
5.	Arctrieval Patient to Self Imaging Study
6.	Arctrieval Patient to Self Medical Records



If any Status values are not added or contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be entered exactly as shown.

When completed, the Medical Record Request Type list must have six entries when Arctrieval is used to filter the Record Type, as shown in the image.

ADD RECORD TYPE		Medical Record Types Setup			Export			
Record Type	Case Types	Case Groups	Template	Actions				
Arctrieval								
Arctrieval Patient to 3rd Party Billing Record	All	All						
Arctrieval Patient to 3rd Party Imaging Study	All	All						
Arctrieval Patient to 3rd Party Medical Record	All	All						
Arctrieval Patient to Self Billing Records	All	All						
Arctrieval Patient to Self Imaging Study	All	All						
Arctrieval Patient to Self Medical Records	All	All						



If any Status values are not added or contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be entered exactly as shown.

4.4. System Parameters

From the Admin drop-down menu in SmartAdvocate, select System Parameters from the list. The system parameters are enabled by SmartAdvocate for your account. When you enter “Arctrieval” in the Group Description filter the following items will be displayed. You will need to confirm and, update as needed, the selected values based on the table below.

Item	Group Description	Parameter Description	Selected Value
1.	Arctrieval	Allow to receive customer statuses	True
2.	Arctrieval	Canceled status of request set by Arctrieval	Arctrieval – Canceled
3.	Arctrieval	Completed status of request set by Arctrieval	Arctrieval - Completed
4.	Arctrieval	Count of days to calculate the Due Date of Invoice from Arctrieval	30
5.	Arctrieval	Disbursement payee UniqueContactID of Invoice from Arctrieval	
6.	Arctrieval	Disbursement invoice shared between plaintiffs	False
7.	Arctrieval	Disbursement check StatusID of Invoice from Arctrieval	Review
8.	Arctrieval	Disbursement Type of Invoice from Arctrieval	Medical Record
9.	Arctrieval	Status indicates what a request should be canceled in Arctrieval	Arctrieval – Need To Cancel
10.	Arctrieval	No records-status of request set by Arctrieval	Arctrieval – No Records
11.	Arctrieval	Set the Type for Notes made of Arctrieval	Medical Records Notes
12.	Arctrieval	Receive statuses only with this prefix	Arctrieval
13.	Arctrieval	Progress status of request set by Arctrieval	Arctrieval – Progress
14.	Arctrieval	Rejected status of request set by Arctrieval	Arctrieval – Rejected
15.	Arctrieval	Status of request to pickup by Arctrieval	Arctrieval – Pickup
16.	Arctrieval	Receive statuses only with this suffix	
17.	Arctrieval	Invoice disputed status of request set by Arctrieval	Arctrieval – Invoice Disputed



If any values contain an error, requests will not be sent from SmartAdvocate to Arctrieval, and any updates from Arctrieval to SmartAdvocate will fail. All the values must be set exactly as shown.

When completed, the System Parameters list must have 16 entries when Arctrieval is used as the filter for the Group Description, as shown in the image.

Group Description	Parameter Description	Selected Value	Action
arctrieval			
Arctrieval	Allow to receive custom statuses	True	
Arctrieval	Canceled status of request set by Arctrieval	Arctrieval - Canceled	
Arctrieval	Completed status of request set by Arctrieval	Arctrieval - Completed	
Arctrieval	Count of days to calculate Due Date of Invoice from Arctrieval	30	
Arctrieval	Disbursement payee UniqueContactID of Invoice from Arctrieval		
Arctrieval	Disbursement invoice shared between plaintiffs	False	
Arctrieval	Disbursement check StatusID of Invoice from Arctrieval	Review	
Arctrieval	Disbursement Type of Invoice from Arctrieval	Medical Records	
Arctrieval	Status indicate what a request should be canceled in Arctrieval	Arctrieval - Need To Cancel	
Arctrieval	No records-status of request set by Arctrieval	Arctrieval - No Records	
Arctrieval	Set the Type for Notes made of Arctrieval	Medical Records Notes	
Arctrieval	Receive statuses only with this prefix	Arctrieval	
Arctrieval	Progress status of request set by Arctrieval	Arctrieval - Progress	
Arctrieval	Rejected status of request set by Arctrieval	Arctrieval - Rejected	
Arctrieval	Status of request to pickup by Arctrieval	Arctrieval - Pickup	
Arctrieval	Receive statuses only with this suffix		

4.5. Display Arctrieval History at Retrieval Provider Notes

The Medical Records—Show Retrieval Provider Notes in the Medical request form must be set to True, as shown in the image, to display the Arctrieval History as part of the retrieval request.

Group Description	Parameter Description	Selected Value	Action
medical	note		
Medical Records	Show Retrieval Provider Notes in Medical request form	True	

4.6. Administrator User API Access Setting

The API Access box must be checked (set to True) in the User Setting, as shown in the image, for the Administrator account used by Arctrieval to access SmartAdvocate.

Add User

Login name:*jvishney@SALawFirm

☐ Is Team

Password:

Contact name:*Vishney, Jared

Default case role:*Attorney

Firm role:*Attorney

Title:*Attorney

Department:

Billing Rate:\$0.00

Teams:

Permission Groups:*Limited Admins

Office:

User Email Login:

User Email Password:

SMTP Server Address:

SMTP Server Port:0

Enable SSL:☐

☒ Active☐ Locked☒ Mobile Application☒ Visible☐ Enforce password change☐ Read Only☒ API Access

Created at 10/28/2019 1:58:00 PM by SmartAdvocate, System.
Modified at 12/3/2024 2:08:00 PM by Bliidy, Nataliya.

UPDATE

CANCEL

5. SmartAdvocate Integration Usage Notes