



Arctrieval Legal
Arctrieval <> SmartAdvocate 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. 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
7/21/2025	1.5	Corrected configuration error related to Arctrieval – Invoice Disputed.
8/2/2025	1.6	Photo ID document subcategory values changed to _Patient Photo ID and _Representative Photo ID
1/15/2026	1.7	Removed three unused values from Medical Provider Records Request Status picklist. Added information about Case Notes configuration.

3. Arctrieval Configuration

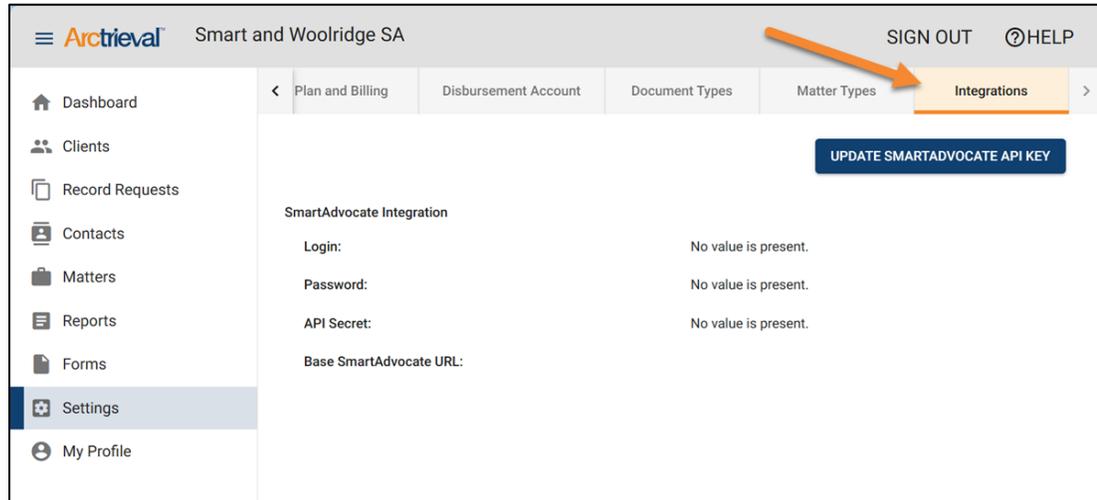
To enable SmartAdvocate and Arctrieval to communicate and exchange data, the following must occur:

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

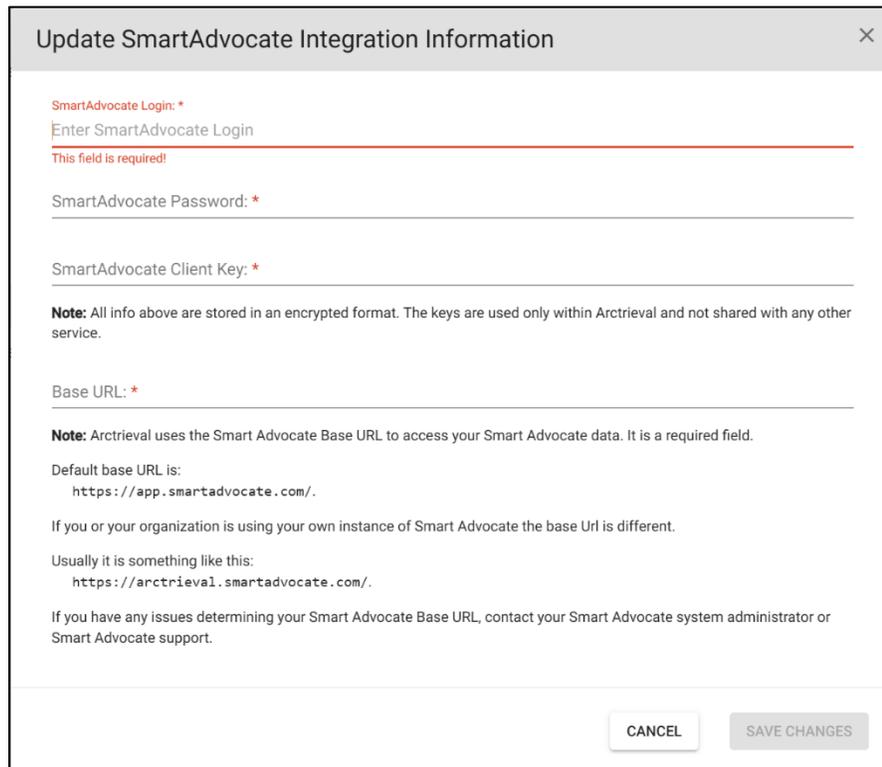
Once the SmartAdvocate and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.



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.





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.

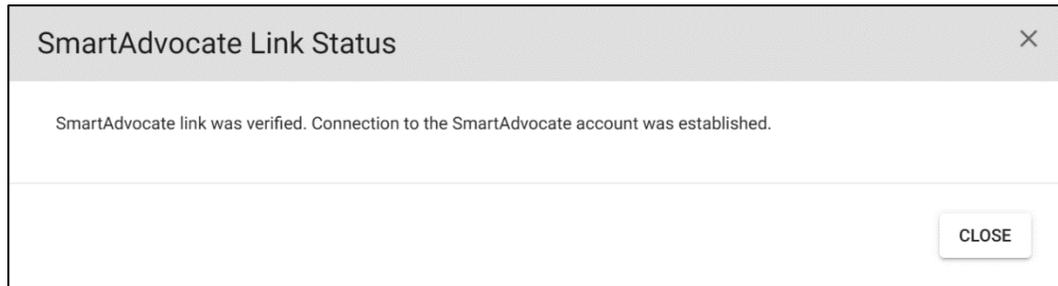
The web page shown in the image is displayed after entering the correct User Name, Password, Client Key, and Base URL for your SmartAdvocate account and clicking the Save Changes button.

Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations
UPDATE SMARTADVOCATE API KEY UPDATE SMARTADVOCATE SETTINGS TEST SMARTADVOCATE LINK REMOVE API KEY						
SMARTADVOCATE INTEGRATION						
Login:	Arctr...wfirm					
Password:	*****					
API Secret:	e0297...7f181					
Base SmartAdvocate URL:	https://api.smartadvocate.com					
Store The Record Request History And Information In Case Notes:	Enabled					
Last Updated On:	12/23/2024					

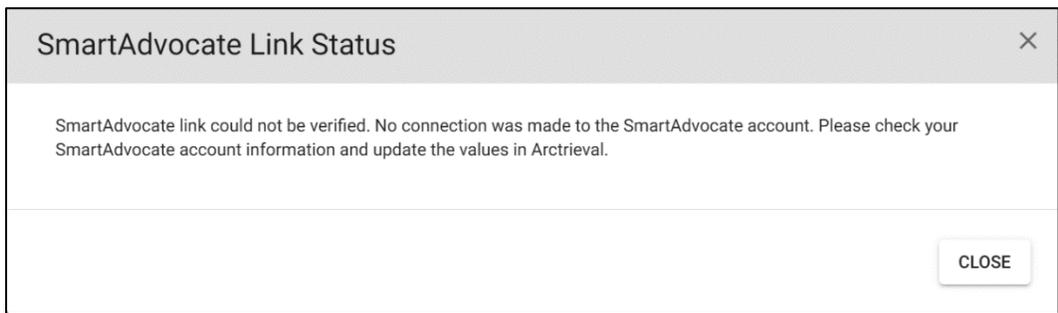
You can verify that the information is correct by clicking the Test SmartAdvocate Link button.

3.2. Test SmartAdvocate Link

Clicking the Test SmartAdvocate Link button verifies that Arctrievial 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.



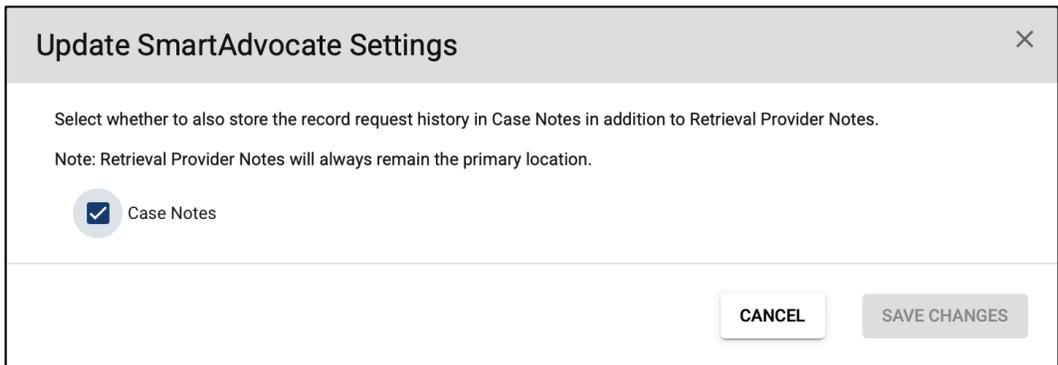
If the test fails, as shown in the image, please start troubleshooting the issue by updating the User name, Password, Client Key, and SmartAdvocate Base URL.



3.3. Update SmartAdvocate Settings

By default, Arctrievial stores the history and notes in the Retrieval Provider Notes for a Medical Request. In addition, Arctrievial can store the information as a Case Note, which can then be searched. To enable or disable the option, click on the Update SmartAdvocate Settings button to display the dialog box in the image.

When the option is enabled, Arctrievial creates and maintains one note per request. When the note is

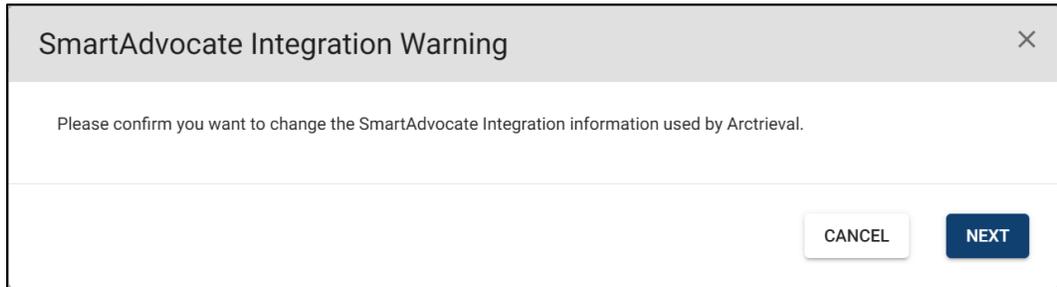


updated in SmartAdvocate, Arctrievial will replace all the information in the note with the new information. Any changes made to the note in SmartAdvocate will be lost.

3.4. 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

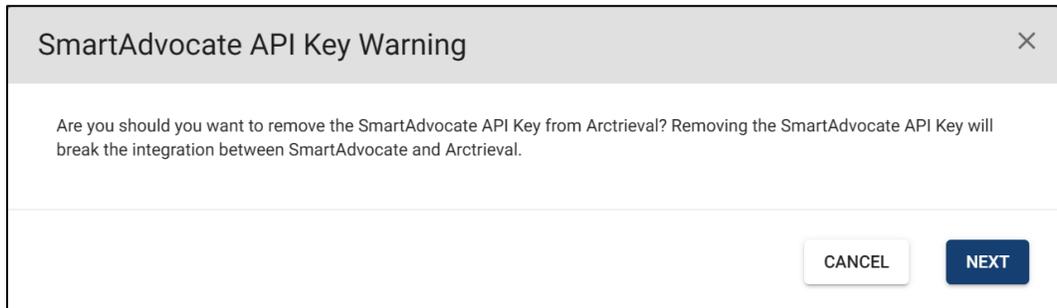


SmartAdvocate API Key dialog box. This functionality should only be used if the original values were incorrect when the link between SmartAdvocate and Arctriever was first established or if the SmartAdvocate account is migrating to a new instance.

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

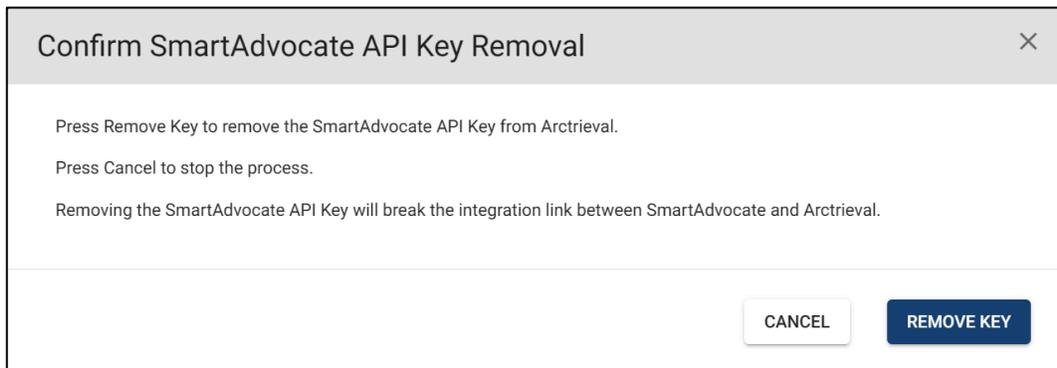
3.5. Remove SmartAdvocate API Key

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 Arctriever.



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.

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 following Document Sub-Categories values must be added:

Item	Sub-Category Value	Category Value
1.	_Intake Form	Arctrieval
2.	_Patient Photo ID	Arctrieval
3.	_Relationship Documentation	Arctrieval
4.	_Representative 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 Photo ID	Arctrieval				 
_Relationship Documentation	Arctrieval				 
_Representative 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 Status – Picklist Maintenance

From the Admin drop-down menu in SmartAdvocate, select Picklist Maintenance and select Medical Provider Records Request Status 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 following Medical Provider Records Request Status 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 - Open	
12.	Arctrieval - Past Due	
13.	Arctrieval - Pickup	
14.	Arctrieval - Progress	
15.	Arctrieval - Rejected	
16.	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 Status Picklist must have 16 entries, and Arctrieval must be used to filter the Category, as shown in the image.

ADD NEW ITEM		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 - Open				
Arctrieval - Past Due				
Arctrieval - Pickup				
Arctrieval - Progress				
Arctrieval - Rejected				
Arctrieval - Saved as Draft				

Page 1 of 1 (16 items) < 1 >



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:*

Case Types:

Case Groups:

Template:

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	



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.

Administrator Parameters Setup			
Group Description	Parameter Description	Selected Value	Action
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.

Administrator Parameters Setup			
Group Description	Parameter Description	Selected Value	Action
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:* @SALawFirm Is Team

Password:

Contact name:*

Default case role:*

Firm role:*

Title:*

Department:

Billing Rate:

Teams:

Permission Groups:*

Office:

User Email Login:

User Email Password:

SMTP Server Address:

SMTP Server Port:

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 Blidy, Nataliya.

5. SmartAdvocate Integration Usage Notes