



Arctrieval Legal
Arctrieval <> CasePeer 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. CasePeer Manage is a leading case management system that law firms use to manage their business.

Arctrieval's integration with CasePeer 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 CasePeer Client information into an Arctrieval Client record through the Arctrieval Add Client process. One client is added from CasePeer to Arctrieval at a time.
 - b. Pull updated CasePeer Client information into the Arctrieval Client record through the Arctrieval Client Activity Update From CasePeer process. Client information is updated in Arctrieval one Client at a time.
 - c. Push updated Arctrieval Client information from Arctrieval Client records to CasePeer Client 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 CasePeer Client information in the CasePeer Contacts List.
 - d. Link an existing Arctrieval Client record with an existing CasePeer Client.
 - e. Remove the link between CasePeer Client information and Arctrieval Client record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
2. Treatment Provider Information (Arctrieval Contact)
 - a. Import CasePeer Treatment Provider information from the CasePeer into an Arctrieval Contact record through the Arctrieval Add Contact process. Each treatment provider is added to an Arctrieval Contact from CasePeer one at a time.
 - b. Pull updated Treatment Provider information from CasePeer into the Arctrieval Contact record through the Arctrieval Contact Activity Update From CasePeer process. Each contact is updated in Arctrieval one at a time.
 - c. Link existing Arctrieval Contact record with an existing CasePeer Contacts List for Companies in the CasePeer Address Book.
 - d. Remove the link between Treatment Providers in CasePeer 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 CasePeer Case
 - a. When the request is sent through Arctrieval, the User selects a CasePeer Case, and Arctrieval automatically links it to the CasePeer Matter.
 - b. If a request was started, created, and sent through Arctrieval, the request can be linked after the fact to an existing CasePeer Case.
4. Data synchronization between Arctrieval and CasePeer
 - a. Within the Case Documents folder, each request created by Arctrieval is stored here with a filename containing the request ID, the client's last name, and date it was created.
 - b. Arctrieval creates and maintains a Note for each request.
 - c. All documents created or uploaded in Arctrieval are uploaded to the document folder in CasePeer.

3. Document Change History

Date	Document Revision	Description of Changes
12/10/2025	1.0	Initial Document.
02/12/2026	1.1	Support for Additional Client Documentation, disabling file uploads to CasePeer by Arctrieval.

4. Integration Setup

4.1. Overview

To enable CasePeer 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 CasePeer 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 CasePeer Account to establish the link between CasePeer and Arctrieval.
3. Verify the required Document Categories were created in CasePeer.

4.2. CasePeer User Permissions

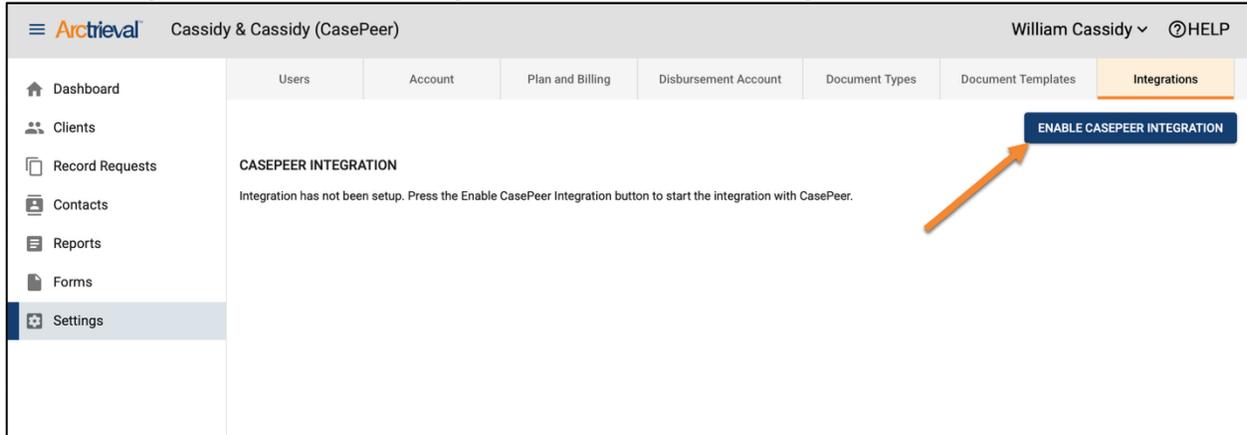
For Arctrieval to successfully integrate with CasePeer, the user setting up the link between Arctrieval and CasePeer must have the following permissions and access rights:

- Accounting Management Page Access
- Administration Settings Page Access
- Client Report Page Access
- Closed Cases Report Page Access
- Defendant Type Report Page Access
- Discovery Management Page Access
- Document Template Upload Center Page Access
- Export Data Page Access
- Fee Change Requests Management Page Access
- Manage Client Intake Forms
- Manage Custom Intakes
- Manage Document Categories
- Manage File Locations
- Manage Firm Lead Sources
- Manage Firm Users
- Medical Provider Report Page Access
- Medical Requests Report Page Access
- Medpay Requests Report Page Access
- Notes Report Page Access
- Notes Report Page Admin Access
- Open Cases Report Page Access
- User Allowed Access All Cases
- User allowed access from any IP regardless of whitelist
- User Can Access Missing Info Report
- User Can Add New Folder For OneDrive
- User Can Archive Demands
- User Can Attach Mail Center Documents Directly To Case
- User Can Create Client Portal
- User Can Delete Paid Costs
- User Can Delete Unpaid Costs
- User Can Edit Case Status
- User Can Edit Date of Intake
- User Can Edit Date Retained
- User Can Edit or Pay Unpaid Costs

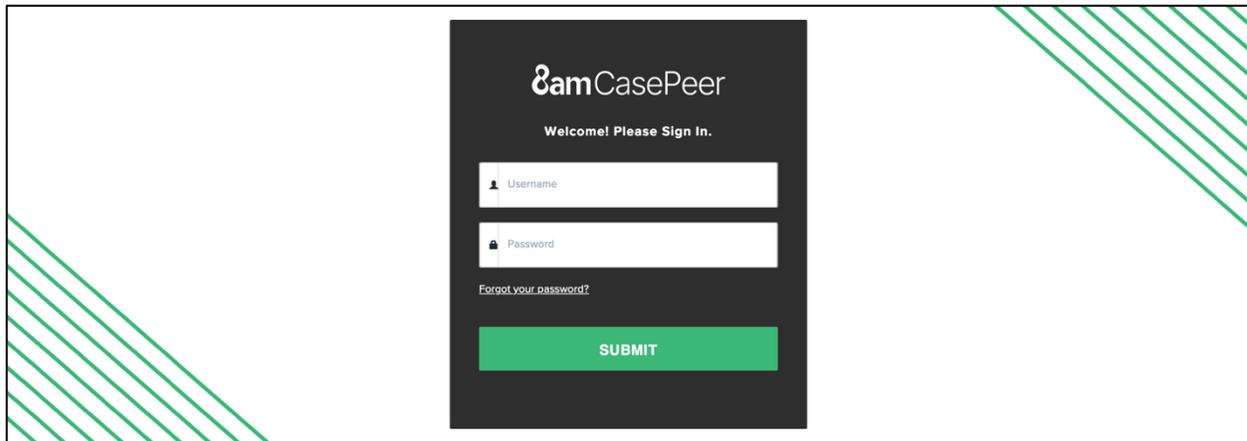
- User Can Edit Paid Costs
- User Can Generate Client Intake Link
- User can interact with CaseStatus
- User Can Manage Case Password Protection
- User Can Manage Document Folders
- User Can Request Costs
- User Can Void Case Costs
- User Has Access to All Documents in the Mail Review Center
- User Has Access to All Emails in the Mail Review Center
- User Has Access To CasePeer File Sync
- User Is Allowed To Add Cases
- User Is Allowed To Add Health Insurance Contacts
- User Is Allowed To Add Health Provider Contacts
- User Is Allowed To Add Police Contacts
- User Is Allowed To Add Subrogation Contacts
- User Is Allowed To Delete A Case
- User Is Allowed To Delete A Client
- User Is Allowed To Delete A Provider Contact
- User Is Allowed To Delete Documents From The Document Tab
- User Is Allowed To Delete Notes
- User Is Allowed To Delete Photos
- User Is Allowed To Delete Recordings
- User is Allowed to Delete Tasks
- User Is Allowed To Edit Case Note Categories
- User Is Allowed To Edit Case Notes
- User Is Allowed To Edit Fee Logic
- User Is Allowed to Edit Health Provider Contacts
- User Is Allowed To Edit Insurance Contacts
- User Is Allowed To Edit Pinned Note
- User Is Allowed To Edit Police Contacts
- User Is Allowed To View All Open Clients Information

4.3. Establishing the Link

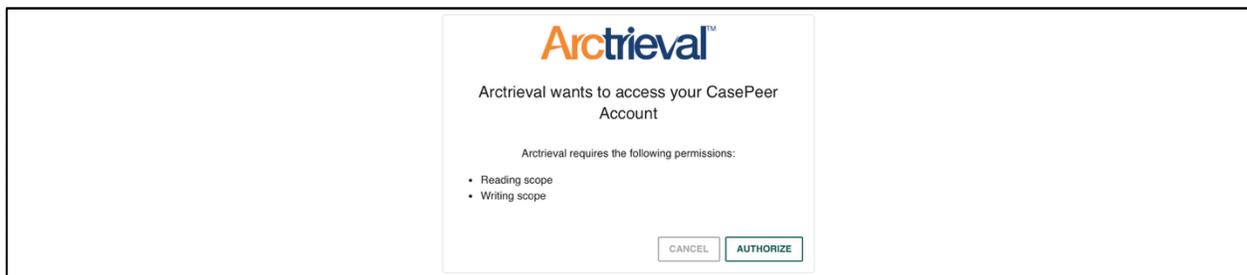
Once the CasePeer and Arctriever integration is enabled, the Arctriever Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.



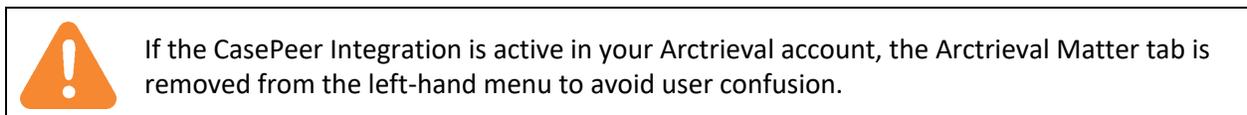
Clicking the Enable CasePeer Integration button will redirect you to either the CasePeer login page or application page, as shown below. If you have not been previously authorized in the current browser, you must enter your email and password to access CasePeer.



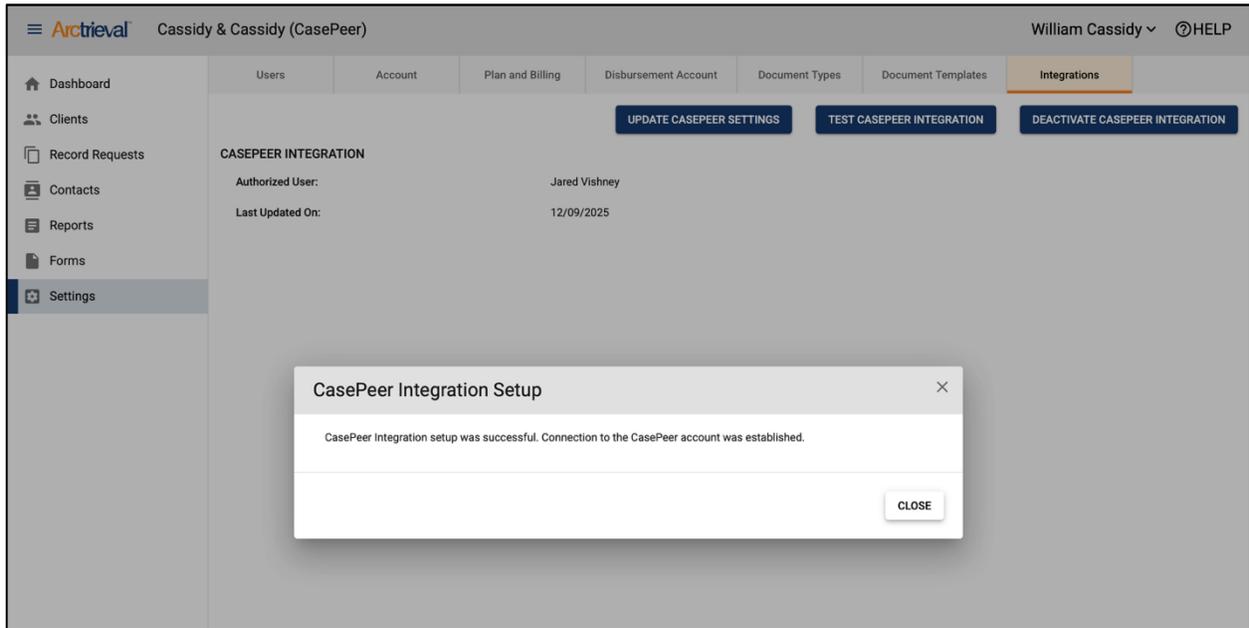
After signing in to CasePeer, you will see the page to grant third-party application access to your CasePeer account, as shown in the image.



Click the Authorize button, and Arctriever will establish the connection to your CasePeer Account. You must approve Arctriever’s access to your CasePeer account, as shown in the image.



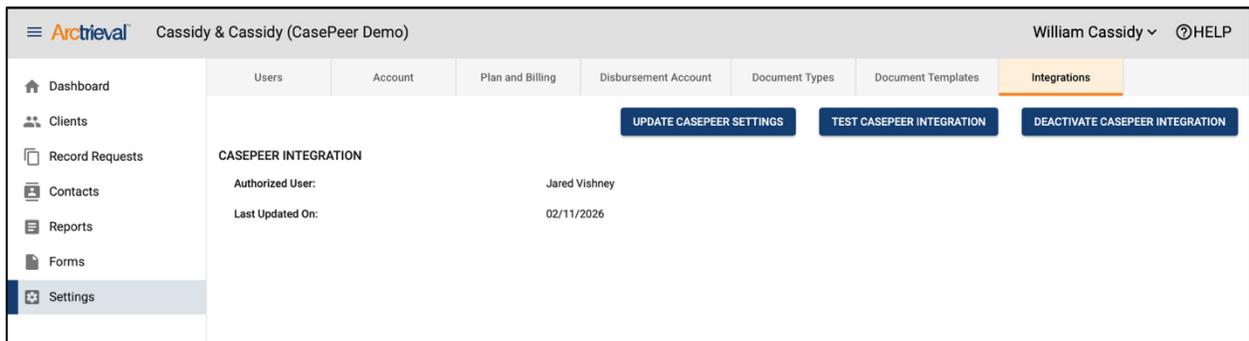
After allowing access, you are redirected to the Arctrieval Integration settings page. The image displays the success message to show whether the integration was successful.



During the integration, the following activities occurred:

1. Arctrieval obtained an access token
2. Arctrieval created the necessary Document Categories (if any are missing).

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

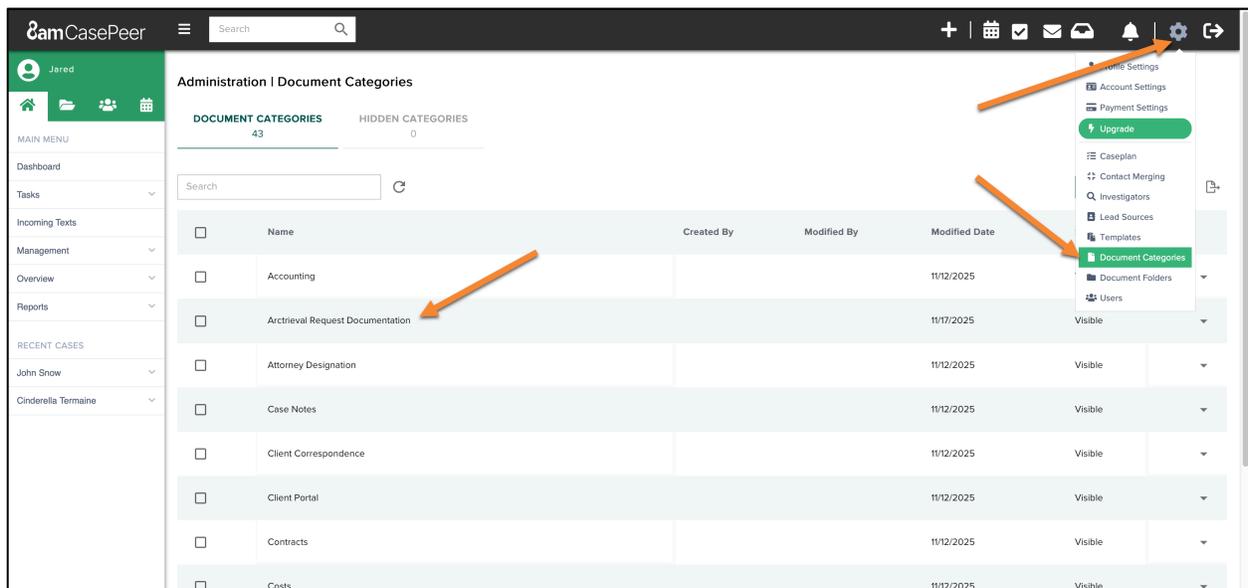


4.4. CasePeer Document Categories

As part of the integration setup, Arctrieval automatically creates six Document Categories in CasePeer for document and file synchronization as follows:

Arctrieval Document Type	CasePeer Document Name	Description
Additional Client Documentation	Additional Client Documentation	Supplemental documents for identity and demographic clarification, benefit or eligibility determination, or workers' compensation documents.
Arctrieval Request Document	Arctrieval Request Documentation	Items created by the Arctrieval request process that are shared with CasePeer.
Intake Forms	Intake Forms	Document 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.
Patient Photo ID	Patient Photo ID	Patient's government-issued photo ID submitted with the request. Adding a photo ID is optional but a best practice.
Personal Representative Relationship Documentation	Personal Representative Relationship Documentation	Explains the relationship between the injured party and the personal representative.
Personal Representative's Photo ID	Personal Representative's Photo ID	Personal representative's government-issued photo ID submitted with the request. Adding a photo ID is optional, but a best practice.

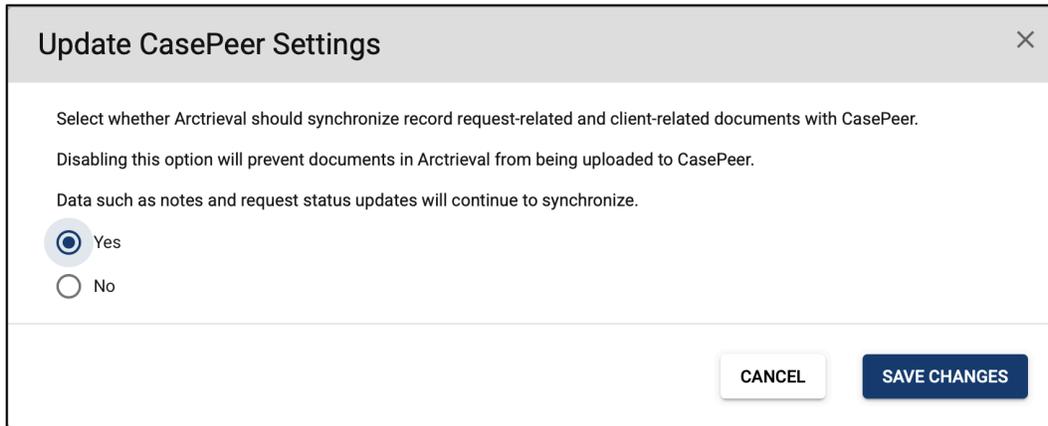
Please verify that the Document Categories were created by going to Administration | Document Categories, as shown in the image.



4.5. Document Storage Location

By default Arctrieval, stores documents created by Arctrieval or uploaded to Arctrieval in the Documents section within CasePeer. Some firms store their documents in another location, such as OneDrive, and do not want to store documents in CasePeer.

To determine how Arctrieval will synchronize request-related and client-related documents and files with CasePeer, click on the Update CasePeer Settings button to display the following dialog box.

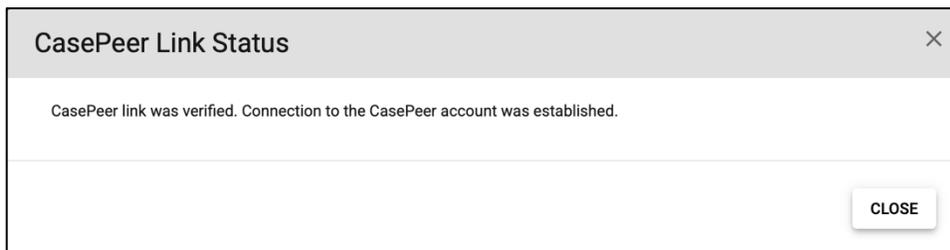


Options

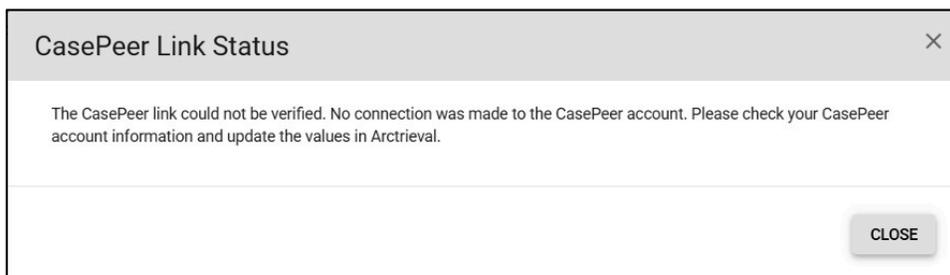
1. "Yes" Arctrieval will synchronize documents to the CasePeer Documents Section
2. "No" Arctrieval does not synchronize documents with CasePeer

4.6. Test CasePeer Integration

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



If the settings are incorrect or there is an issue, you will see the message shown in the image.





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

5. Deactivate CasePeer Integration

If you want to remove the integration between Arctrieval and CasePeer, click the Deactivate CasePeer Integration button to display the following dialog box.

Deactivate CasePeer Integration

Are you sure you want to deactivate the CasePeer integration? Deactivating this integration will remove all associated integration key data and break the link between CasePeer and Arctrieval.

To deactivate CasePeer Integration, type the word **deactivate**:

Deactivate

CANCEL DEACTIVATE INTEGRATION

To proceed with deactivation, type Deactivate in the provided field and click the Deactivate Integration button to display the confirmation dialog box.

Confirm CasePeer Connection Deactivation

Press Deactivate Integration to remove the CasePeer link information from Arctrieval.

Press Cancel to stop the process.

Removing the CasePeer link will break the integration link between CasePeer and Arctrieval.

CANCEL DEACTIVATE INTEGRATION

Pressing Deactivate Integration will remove the link between CasePeer and Arctrieval and provide the final confirmation as shown below.

CasePeer Connection Deactivation

The CasePeer connection was deactivated.

CLOSE

6. Arctrieval Role-Based Permissions for CasePeer

When the CasePeer Integration is active in Arctrieval, additional role-based permissions determine whether an Arctrieval User may Unlink a CasePeer Client or CasePeer Contact from the respective Client or Contact record in Arctrieval.

It also determines if an Arctrieval User may Unlink a request from Arctrieval to the request in CasePeer.

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

✕

Edit User Account Information

First Name:*
Bill

Last Name:*
Cassidy

Title:

Email Address:*
bcassidy@m-c-unlimited.com

Username:*
BCassidy

User Level:*
User

Alternate Address
User Settings
Signature

Allowed To Update Own Profile?	<input checked="" type="checkbox"/>	Allowed To Merge Contacts And Requests?	<input checked="" type="checkbox"/>
Allowed To Change Password?	<input checked="" type="checkbox"/>	Allowed To Disable Contact Follow-Up?	<input checked="" type="checkbox"/>
Allowed To Delete Information?	<input checked="" type="checkbox"/>	Allowed To Complete Other User's Activity?	<input checked="" type="checkbox"/>
Allowed To Add Contacts?	<input checked="" type="checkbox"/>		
Allowed To Merge Clients And Requests?	<input checked="" type="checkbox"/>		
Allowed To Unlink CasePeer Client?	<input checked="" type="checkbox"/>		
Allowed To Unlink CasePeer Contact?	<input checked="" type="checkbox"/>		
Allowed To Unlink CasePeer Request?	<input checked="" type="checkbox"/>		

Request Status Notifications: Enabled

CANCEL
SAVE CHANGES



The permissions to Unlink CasePeer Client, Unlink CasePeer Contact, and Unlink CasePeer Request are enabled by default.

7. Configuration Notes

7.1. Data Synchronization Queue

If you deactivate the CasePeer integration and later re-enable it, Arctrieval automatically resumes synchronizing all queued request updates. Arctrieval maintains an internal record-request queue that stores status changes, documents, notes, and related request activity whenever:

1. CasePeer is temporarily unavailable,
2. a brief connectivity or API outage occurs,
3. credentials are updated or restored, or
4. the integration is deactivated and later turned back on.

Once the link is active again, Arctrieval processes the queue and automatically applies those request-level updates to CasePeer.



However, changes made to Clients in Arctrieval while the integration is inactive are not automatically pushed to CasePeer. To update this information, you must either:

1. Manually update the information in CasePeer
2. Edit the Client in Arctrieval to trigger the update process.

7.2. Linked CMS Columns and CVS Exports

When the CasePeer integration is enabled, Arctrieval surfaces additional fields to help users understand how their data is connected to external case management systems.

When the CasePeer integration is active, users will see:

1. Linked to CMS columns in data tables to indicate whether a Client, Contact, or Request is currently associated with a case management system record.
2. Linked to CMS and External Reference ID fields included in CSV exports for easier reconciliation, reporting, and troubleshooting.

These fields are informational only. They help users verify the linkage status and understand how Arctrieval communicates with CasePeer.

8. Current Limitations

There are a few limitations on what is possible within CasePeer when sending certain information from Arctrieval or processing specific actions within CasePeer. The limitations are described below. As additional functionality becomes available, Arctrieval will be able to update its functionality.

8.1. Creating Contact (Medical Provider) in CasePeer

Arctrieval cannot create new Contacts (medical providers) in CasePeer through the API. CasePeer only permits third-party applications to update or synchronize data for Contacts that already exist in the CasePeer Address Book.

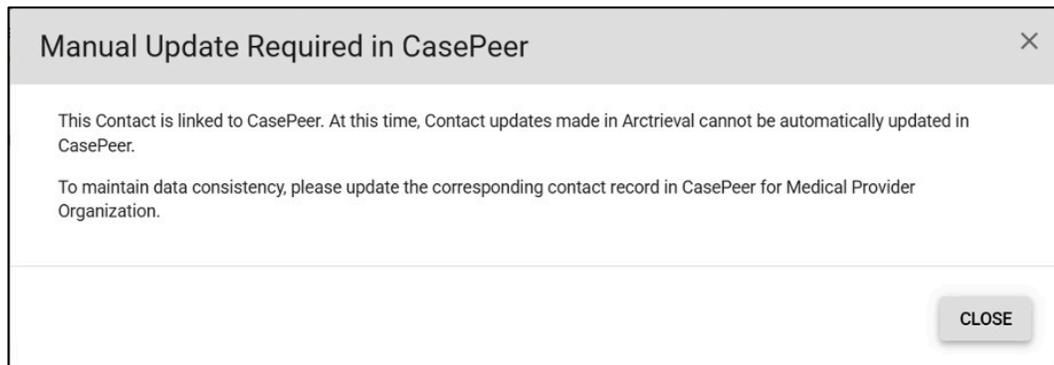
If a user creates a request in Arctrieval for a Contact that is not linked to CasePeer, Arctrieval can send the request information to the CasePeer case, but cannot create the corresponding provider record in CasePeer. This may result in request data appearing in CasePeer without an associated provider Contact.

Recommended workflow: Before creating a record request in Arctrieval, first link the Arctrieval Contact to the corresponding CasePeer provider entry. If the provider does not yet exist in CasePeer, create it in CasePeer, then link it to the Arctrieval Contact. Once linked, new requests will synchronize correctly.

8.2. Updating Contact (Medical Provider) Information

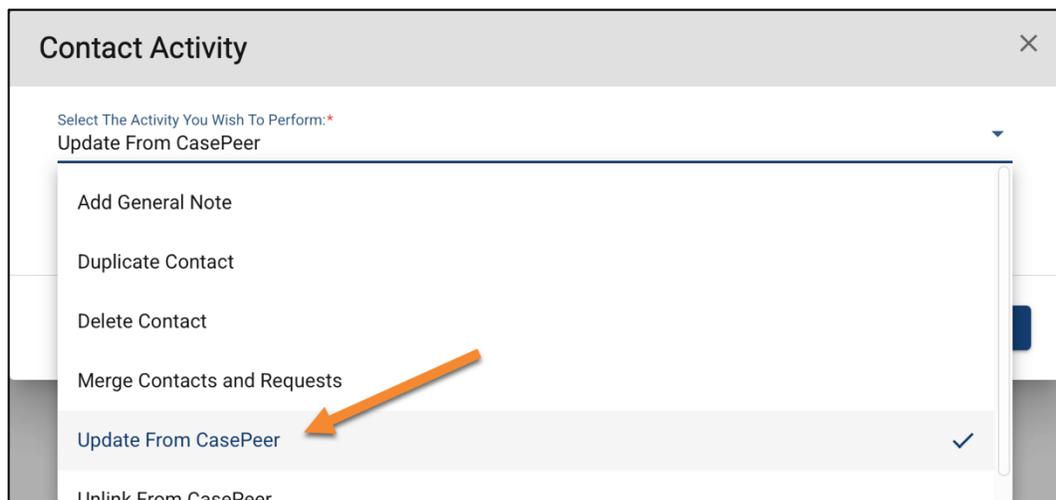
At present, it is not possible to update a CasePeer Medical Provider's information from Arctrieval. If you make a

change to the Contact information in Arctrieval and want to update it in CasePeer the following message is displayed.



You will need to update the record in CasePeer to maintain data synchronization.

The better option is to update the information in CasePeer first and then use the Update From CasePeer Contact Activity to import the changes into Arctrieval. The activity is shown in the image.



8.3. Deleting Information

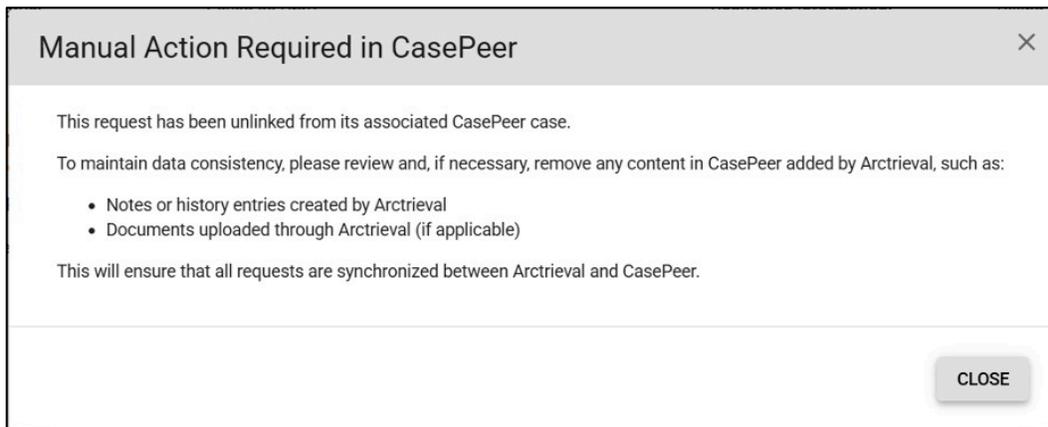
The CasePeer API does not permit third-party applications to delete data in CasePeer. This limitation applies to all deletions initiated in Arctrieval, including:

1. Unlinking a Request from CasePeer
2. Unlinking a Client from CasePeer
3. Unlinking a Contact from CasePeer
4. Deleting documents in Arctrieval that were previously uploaded to CasePeer
5. Removing any Arctrieval-synchronized data that already exists in a CasePeer case

If you use the Unlink From CasePeer activity on a request, Arctrieval will remove the association internally, but it cannot delete the request record, notes, or documents that already exist in CasePeer.

Similarly, if you delete a document in Arctrieval that was synchronized to CasePeer, the deletion will not be reflected in CasePeer.

Required action: Any information that needs to be removed from a CasePeer case must be deleted manually within CasePeer.



8.4. CasePeer Integration Authorization Expiration

Arctrieval uses secure access and refresh tokens provided by CasePeer to maintain the integration and synchronize data between the two systems. These tokens allow Arctrieval to post updates, documents, and notes to CasePeer without requiring the user to log in each time.

Arctrieval automatically refreshes tokens in the background as long as the integration remains active. No user action is needed during regular operation.

However, both the access token and the refresh token have defined expiration periods. If both tokens expire or become invalid for any reason (for example, a password reset or a permissions change in CasePeer), Arctrieval can no longer communicate with CasePeer.

When integration authorization expires:

1. Arctrieval sends an email notification to the firm's Attorney Administrator alerting them that re-authorization is required, and
2. Arctrieval creates a Dashboard Activity so the firm can clearly see that the integration is no longer active.

To restore full functionality, the Attorney Administrator must return to Settings → Integrations in Arctrieval and re-authorize the CasePeer connection.

Once re-authorized, Arctrieval will resume synchronizing queued request updates automatically.