



Arctrieval Legal
Arctrieval <> Clio Integration Setup Guide

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1. Introduction

This document explains how to configure the integration between Arctrieval and Clio Manage. It is intended for Arctrieval firm administrators and Clio administrators responsible for system configuration.

2. Prerequisites

Before configuring the integration between Arctrieval and Clio Manage, the following requirements must be met.

- The firm must have an Arctrieval subscription that supports multiple users. The Clio integration is available only for multi-user subscriptions.
- The user performing the setup must be an Arctrieval Attorney Firm Administrator.
- The Clio user authorizing the integration must have Clio Administrator privileges.
- The Clio administrator must have permission to create Custom Fields and Document Categories in Clio Manage.

If these requirements are not met, the integration setup process may fail, or certain configuration steps may not complete successfully.

3. Functionality Overview

The Arctrieval integration allows information to be exchanged between Arctrieval and Clio Manage. The integration synchronizes Clients, Medical Providers (Contacts), Matters, Documents, and Request Activity between the two systems.

The following section describes how data is synchronized between Arctrieval and Clio Manage. These operations occur through user actions within Arctrieval.

The following synchronization operations are supported.

3.1. Import from Clio

Information stored in Clio can be imported into Arctrieval to create new records.

- Client Import – Client information from the Clio Contacts list can be imported into Arctrieval as a Client record using the Arctrieval Add Client process.
- Medical Provider Import – Company contacts in Clio can be imported into Arctrieval as Medical Provider Contacts using the Arctrieval Add Contact process.

Each record is imported individually.

3.2. Update from Clio

Existing records in Arctrieval can be refreshed using the latest information stored in Clio.

- Client Updates – Updated Client information from Clio Contacts can be pulled into the corresponding Arctrieval Client record using the Arctrieval Update From Clio process.
- Medical Provider Updates – Updated company contact information in Clio can be pulled into the associated Arctrieval Contact record.

Each record update is performed individually.

3.3. Push Updates to Clio

Changes made in Arctrieval can be sent to Clio to keep both systems synchronized.

- Client Updates – When Client information is modified in Arctrieval, the user is prompted to update the corresponding Client information in Clio.

- Medical Provider Updates – Changes to Medical Provider information in Arctrieval can be pushed to the corresponding Company Contact in Clio.

Users must confirm the update before information is written to Clio.

3.4. Link Existing Records

Existing records in Arctrieval can be linked to records already present in Clio.

- Client Linking – An existing Arctrieval Client record can be linked to an existing Client contact in Clio.
- Medical Provider Linking – An existing Arctrieval Contact record can be linked to a Company Contact in the Clio address book.

Linking allows both systems to synchronize information between the associated records.

3.5. Remove Existing Links

The connection between Arctrieval and Clio records can be removed if necessary.

- Client Link Removal – An Arctrieval Client can be unlinked from the associated Client in Clio.
- Contact Link Removal – An Arctrieval Contact can be unlinked from the associated Company Contact in Clio.

Only users with the appropriate Arctrieval permissions may remove these links.

3.6. Matter Linking

Arctrieval Requests can be associated with Clio Matters.

- When a request is created in Arctrieval, the user selects the appropriate Clio Matter.
- A request already created in Arctrieval can also be linked to a Clio Matter after it has been issued.

Once linked, request activity and documents generated by Arctrieval are synchronized with the associated Matter in Clio.

4. Document Change History

Date	Document Revision	Description of Changes
8/2/2024	1.0	Initial Document.
9/15/2025	1.1	Remove erroneous references to other case management systems.
3/17/2026	1.2	Clio Contact Field Limits Notice, Optional Sex Assigned at Birth Contact Field, Support for Additional Client Documentation, Pre-requisites clarified,

5. Integration Setup

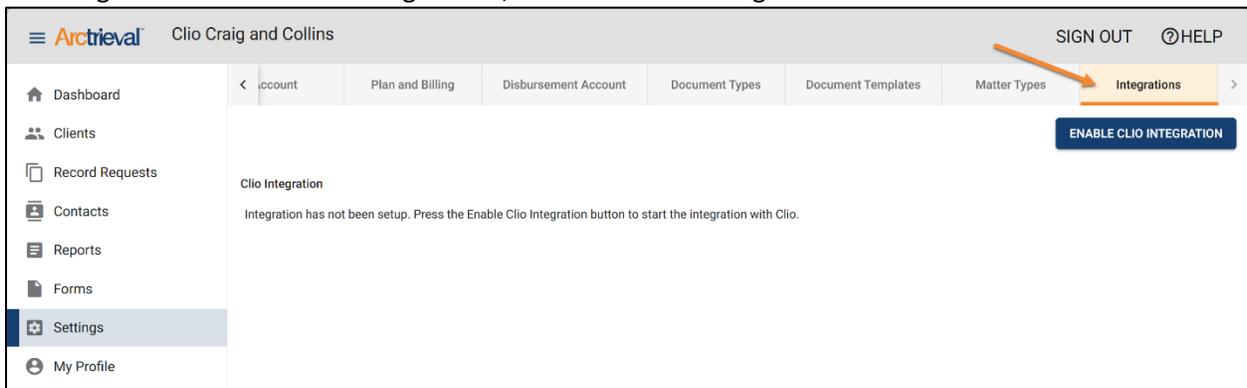
5.1. Overview

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

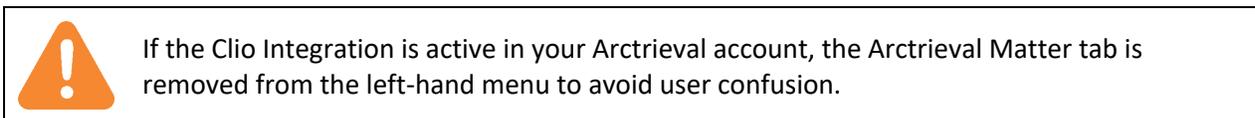
1. Arctrieval activates the Integrations tab in the Arctrieval Settings for firms with a multiple-user subscription. The Clio integration feature is only available to firms with a subscription for multiple users. Please contact Arctrieval to activate the feature.
2. On the Arctrieval Integration page, in the Settings menu, you must grant Arctrieval access to your Clio Manage Account to establish the link between Clio Manage and Arctrieval.
3. Add required Custom Fields to Clio Manage
4. Add required Document Categories to Clio Manage

5.2. Establishing the Link

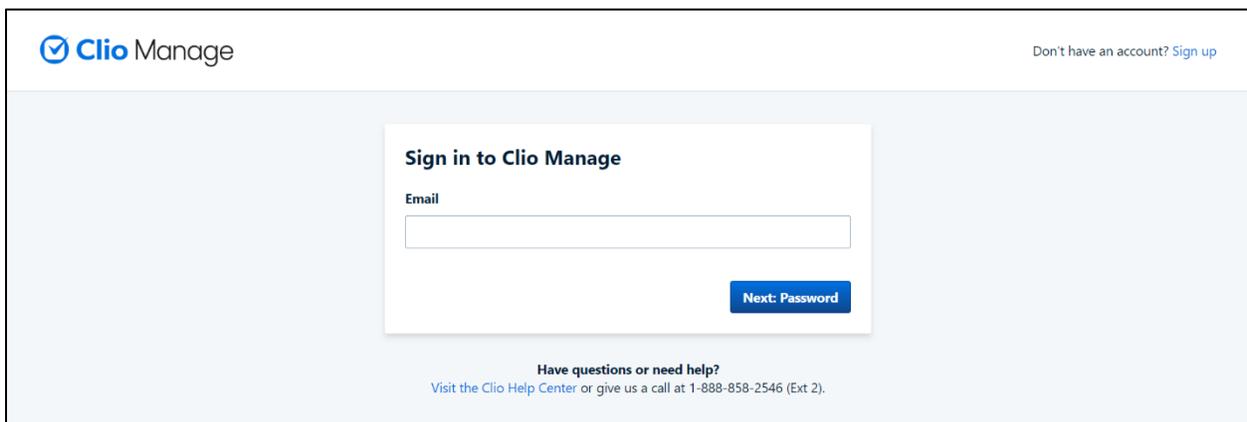
Once the Clio and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.



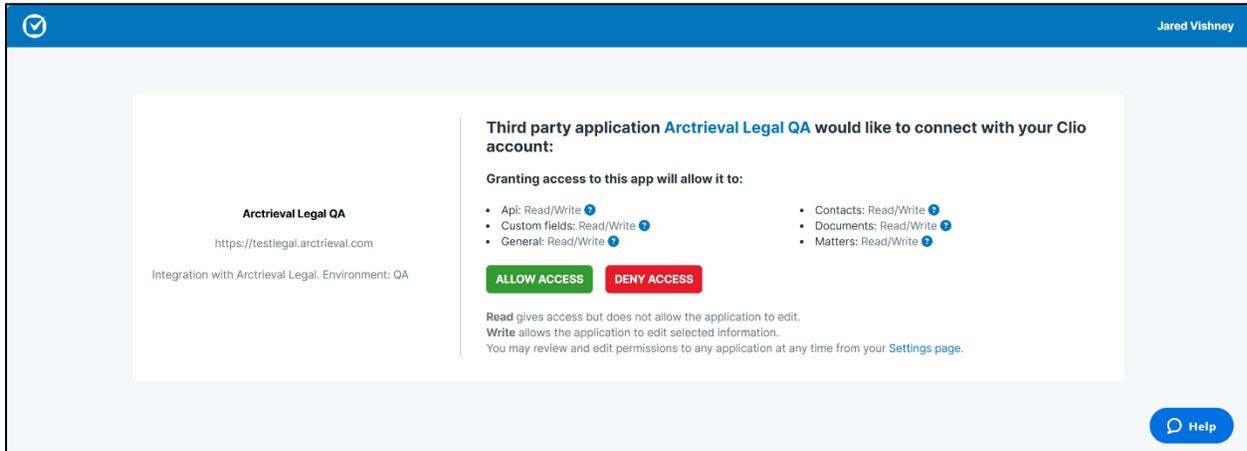
Clicking the Enable Clio Integration button will redirect you to the Clio Manage application, where you must approve Arctrieval’s access to your Clio account, as shown in the image.



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



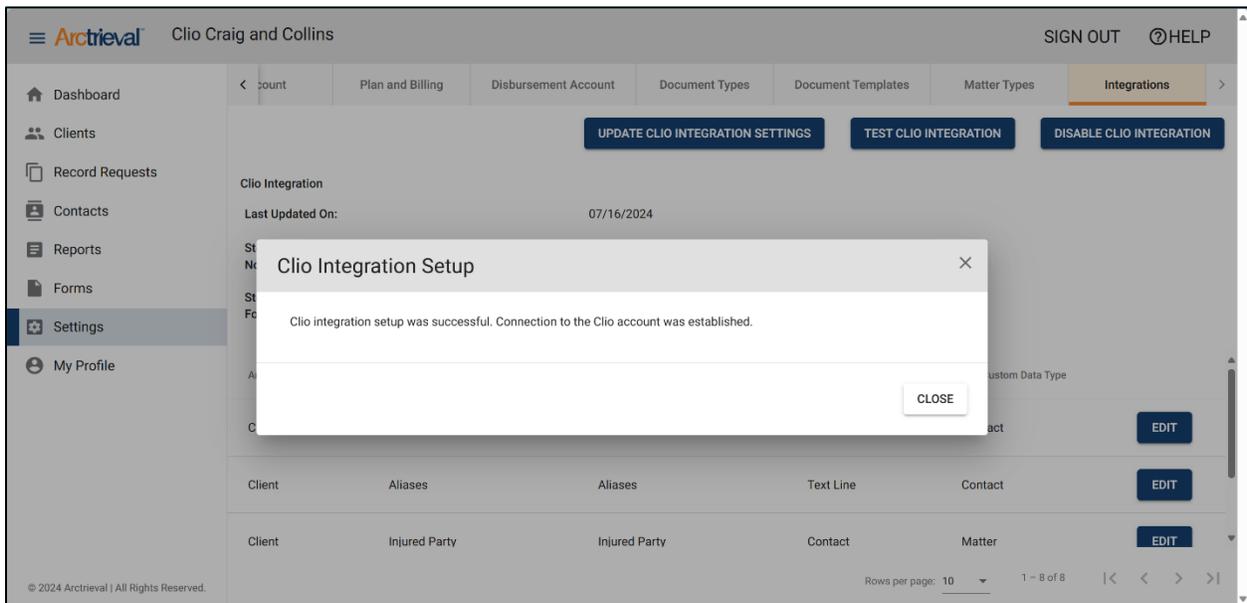
After signing into Clio Manage, you will see the page to grant third-party application access to your Clio account. Click the Allow Access button, and Arctrieval will establish the connection to your Clio Account, as shown in the image.



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

- Api
- Contacts
- Custom fields
- Documents
- General
- Matters

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. Obtaining an access token
2. Creating the necessary Arctriever Custom Fields (if any are missing).
3. Creating the necessary Document categories (if any are missing).

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

Arctriever Data Type	Arctriever Field Name	Clio Custom Field Name	Clio Custom Field Type	Clio Custom Data Type	
Client	Last 4 Of SSN	Last 4 Of SSN	Text Line	Contact	EDIT
Client	Aliases	Aliases	Text Line	Contact	EDIT
Client	Language Preference	Language Preference	Picklist	Contact	EDIT
Client	Injured Party	Injured Party	Contact	Matter	EDIT

5.3. Test Clio Integration

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

Clio Link Status

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

CLOSE

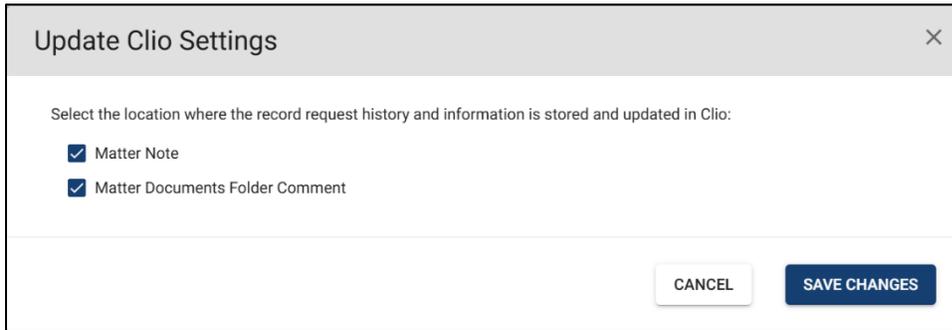


If the link verification fails, Arctriever cannot use the Setup information to access Clio Manage. Please verify that the data is correct and that you can enable a Third-Party connection within Clio Manage.

5.4. Update Clio Integration Settings

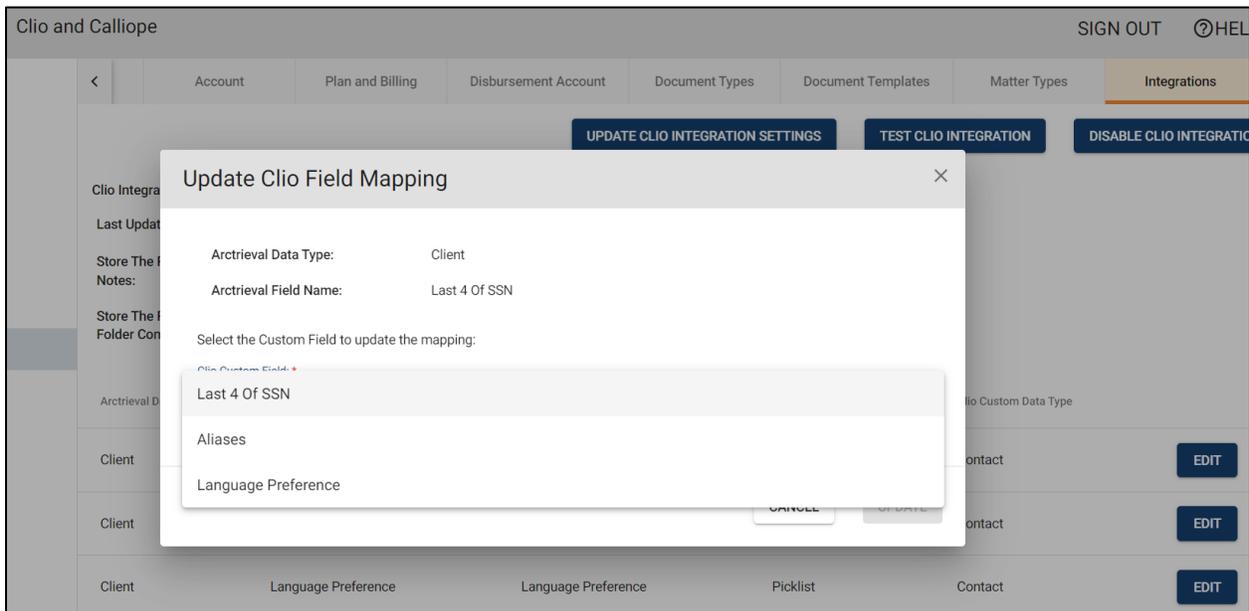
You can choose where the Request History information from Arctriever is stored and maintained in Clio. It can be stored in the Matter Note section or as a comment in the Record Request folder in the Matter Document section. By default, Arctriever places the information in both sections.

You can change where the information is stored by clicking on the Update Clio Integration Settings button, which displays the dialog box shown.



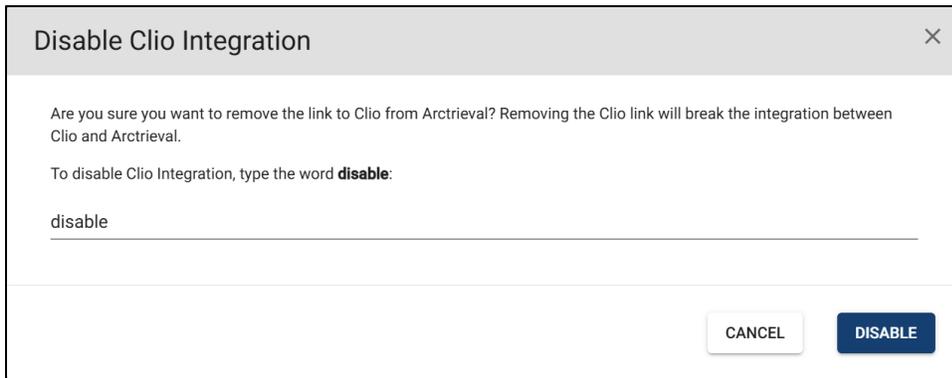
5.5. Clio Custom Field Mapping

The Attorney Firm Administrator can create a field with the appropriate type and desired name in Clio and then edit the mapping settings in Arctriever.



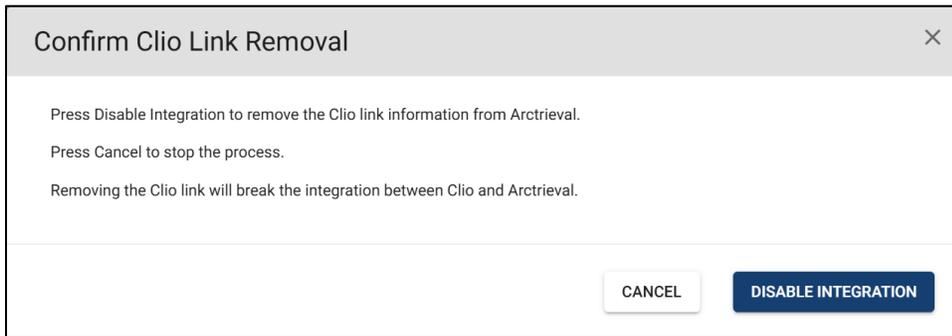
5.6. Disable Clio Integration

If you want to remove the integration between Arctrieval and Clio, click the Disable Clio Integration button and type the word disable as shown in the image.



The screenshot shows a dialog box titled "Disable Clio Integration" with a close button (X) in the top right corner. The main text asks, "Are you sure you want to remove the link to Clio from Arctrieval? Removing the Clio link will break the integration between Clio and Arctrieval." Below this, it says, "To disable Clio Integration, type the word **disable**:" followed by a text input field containing the word "disable". At the bottom right, there are two buttons: "CANCEL" and "DISABLE".

As shown in the image, you are then asked to confirm you want to remove the link between Clio and Arctrieval.



The screenshot shows a dialog box titled "Confirm Clio Link Removal" with a close button (X) in the top right corner. The main text contains three lines: "Press Disable Integration to remove the Clio link information from Arctrieval.", "Press Cancel to stop the process.", and "Removing the Clio link will break the integration between Clio and Arctrieval." At the bottom right, there are two buttons: "CANCEL" and "DISABLE INTEGRATION".

Pressing Disable Integration will remove the link between Clio and Arctrieval.

6. Clio Settings

Arctrieval automatically creates all necessary objects in your Clio Manage account during the integration setup process. However, if the setup has any errors, a Clio Administrator must manually create the required objects as described below.

6.1. Arctrieval Document categories in Clio

Arctrieval uses the following Document categories as part of the integration:

- Arctrieval Intake Form—identifies the document in Clio 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.
- Arctrieval Patient’s Photo ID—identifies the document in Clio that is the patient’s government-issued photo ID submitted with the request. Adding a photo ID is optional but a best practice.
- Additional Client Documentation—includes files for identity and demographic clarification, benefit and eligibility items, or notices of representation in Workers’ compensation.
- Arctrieval Relationship Documentation—information that clarifies the relationship between the injured party and the personal representative who is pursuing the claim or case, such as a parent or legal guardian.
- Arctrieval Representative’s Photo ID—identifies the document in Clio that is the personal representative’s government-issued photo ID submitted with the request. Adding a photo ID is optional, but a best practice.
- Arctrieval Request Document—identifies documents created by the Arctrieval request process that are shared with Clio.

6.2. Arctrieval Matter Custom Fields in Clio

The Individual Fields are:

- Injured Party
- Personal Rep Relationship
- Personal Rep Relationship Other
- Matter Client is Injury Party
- Personal Representative

The Matter Field Set for Arctrieval is as follows:

The screenshot shows the 'Settings > Custom Fields' interface. It has tabs for 'Matter Custom Fields', 'Contact Custom Fields', and 'Convert custom fields'. An 'ADD' button is in the top right. Under 'Individual Fields', the 'Field Sets' tab is active. A table lists the 'Arctrieval' field set with its members and a default checkbox.

Name	Members	Default
Arctrieval Edit Delete	Personal Representative, Personal Rep Relationship, Personal Rep Relationship Other, Matter Client is Injured Party, Injured Party	<input type="checkbox"/>

The Matter Custom Fields must be set as follows:

Section	Field Name	Type	Options
Matter	Personal Representative	Contact Select	
Matter	Personal Rep Relationship	Picklist	<ul style="list-style-type: none"> ● Parent ● Legal Guardian ● Medical Power Of Attorney ● Next Of Kin ● Other
Matter	Personal Rep Relationship Other	Text (One-Line)	
Matter	Matter Client is Injured Party	Picklist	<ul style="list-style-type: none"> ● Yes ● No
Matter	Injured Party	Contact Select	



The Arctrieval integration assumes the injured individual is the Client Contact for a Matter. If the Client Contact is not the injured individual, then additional information is needed in the Arctrieval Customer Fields.

Custom Field Descriptions and Arctrieval Usage:

1. Personal Representative—Captures the contact information for the person who is the Personal Representative for the injured individual as defined by HIPAA. The Personal Representative would be a parent or legal guardian in the case of a minor child, the next of kin in the case of a deceased person, or someone named in a medical power of attorney.
2. Personal Rep Relationship—This option captures the nature of the relationship between the Personal Representative and the injured party. If the listed options do not correctly describe the relationship, you can select the “Other” option.
3. Personal Rep Relationship Other—A description of the relationship if the select relationship is “Other”
4. Matter Client is Injured Party—The Arctrieval integration assumes the injured individual is the Client Contact for a Matter. If this is true, you should select “Yes” or nothing. You should choose “No” if false so Arctrieval does not misuse the information. For example, if the mother, father, or legal guardian is the Matter Client, you would select “No.”
5. Injry Party—If the Matter Client Contact is not the Injured party and you selected “No,” you must indicate the person to use as the Injured Party.



After the integration between Clio and Arctrieval is established, changing or deleting the custom fields may break the communication between the two systems. If you need to make changes, we strongly recommend updating only the name in Clio and then updating the name in Arctrieval. Deleting a custom field is discouraged.

6.3. Arctrieval Contact Custom Fields in Clio

The Individual Fields are:

- Last 4 of SSN
- Aliases
- Language Preference
- Sex Assigned at Birth

The Contact Field Set for Arctrieval is as follows:



The Contact Custom Fields must be set up as follows:

Section	Field Name	Type	Options
Contact	Last 4 Of SSN	Text (One-Line)	
Contact	Aliases	Text (One-Line)	
Contact	Language Preference	Picklist	<ul style="list-style-type: none"> • English • Spanish
Contact	Sex Assigned at Birth	Picklist	<ul style="list-style-type: none"> • Male • Female

Custom Field Descriptions and Arctrieval Usage:

1. Last 4 Of SSN—The last four digits of the patient’s (injured party) social security number. The number is included on the individual right of access request to assist providers in identifying the individual and locating their information. Optional value.
2. Aliases—Include names that the patient (injured party) may use, such as nicknames, also known as, or a maiden name. The names are included on the individual right of access request to assist providers in identifying the individual and locating their information. Optional value.
3. Language Preference—Determines the preferred language to communicate with the Contact (Arctrieval Client) when emailing or texting a link to the Arctrieval Intake Form. English is the default value. Optional value.
4. Sex Assigned at Birth—Specifies what Sex the individual was assigned at birth. Optional value.

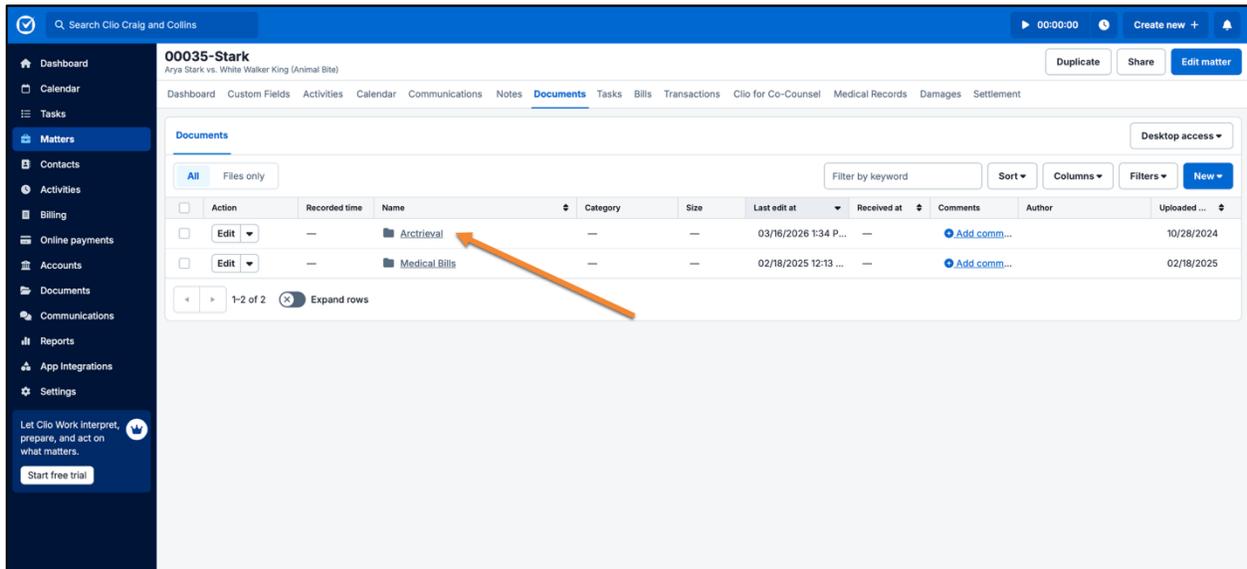


After the integration between Clio and Arctrieval is established, changing or deleting the custom fields may break the communication between the two systems. If you need to make changes, we strongly recommend updating only the name in Clio and then updating the name in Arctrieval. Deleting a custom field is discouraged.

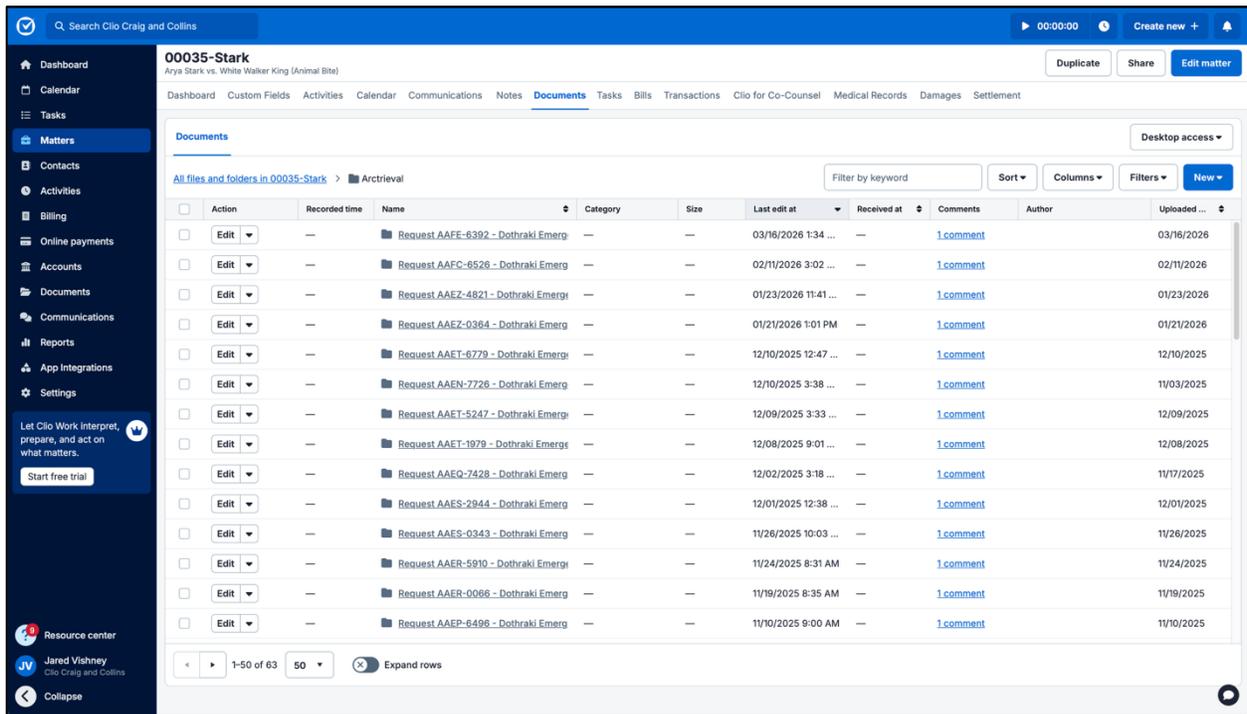
7. Data Structure in Clio

7.1. Documents

Arctrievl creates an “Arctrievl” folder in the Documents section of a matter to store information.



Within the Arctrievl folder, a unique folder is created for each request.



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Each request folder includes a comment containing the Request History information. Whenever an activity happens in Arctrieval for a Request, Arctrieval automatically updates the associated comment.



Arctrieval updates the Comment in Clio by **OVERWRITING** the entire comment with the information from Arctrieval. Any changes made to the Comments in Clio will be lost in the next update. If you need to make a note or add information about the request, you should do it in Arctrieval.

The screenshot shows the Clio interface for matter 00035-Stark. A modal window titled '1 Comments' is open, displaying a comment from Jared Vishney. The comment contains the following information:

- Request Info: Arctrieval ID: AAFE-6392, Healthcare Provider: Dothraki Emergency Transportation
- Requested Information: Discharge Summary, Electronic Health Record Audit Trail, History & Physical Exams, Laboratory Reports, Pathology Reports, Problem List, Radiology Reports, Signed Nurses Notes.
- Request Type: Patient Directed to 3rd Party
- Request Status: Open
- Starting Date Of Service: 11/04/2025
- Ending Date Of Service: 01/04/2026
- Request Date: 02/24/2026
- Request Due Date: 03/28/2026
- Last Activity Date: 03/16/2026

The History section of the comment reads: '03/16/2026 08:31 PM Request was successfully linked to the matter in Clio. Matter name: 00035-Stark. 03/17/2026 11:10 AM The delivery was successful for the request or correspondence sent to Dothraki Emergency Transportation at dothraki Loi@m-c-unlimited.com. 03/11/2026 11:09 AM Request due date reminder sent by email to dothraki_loi@m-c-unlimited.com.'

All related documents are stored within each request folder. Every document related to the request created or uploaded to Arctrieval is automatically copied to the Request folder.

The screenshot shows the Clio interface for matter 00035-Stark, filtered to show documents related to Request AAFE-6392. The document list is as follows:

Action	Recorded time	Name	Category	Size	Last edit at	Received at	Comments	Author	Uploaded ...
Download	Add time	Record_Request_Due_Date_Rem...	Arctrieval Reques...	534 KB	03/16/2026 1:34 P...	03/16/2026	Add comm...		03/16/2026
Download	Add time	Record_Request_Follow_Up_AAF...	Arctrieval Reques...	534 KB	03/16/2026 1:34 P...	03/16/2026	Add comm...		03/16/2026
Download	Add time	Record_Request_AAFE-6392_Sta...	Arctrieval Reques...	530 KB	03/16/2026 1:34 P...	03/16/2026	Add comm...		03/16/2026

7.2. Notes

A unique Note is created in the Matters Notes section for each request. Whenever an event or activity occurs in Arctrieval for a Request, Arctrieval automatically updates the associated Note.



Arctrieval updates the Notes in Clio by **OVERWRITING** the entire Note with the information from Arctrieval. Any changes made to the Note in Clio will be lost in the next update. If you need to make a note or add information about the request, you should do it in Arctrieval.

Actions	Recorded time	Date	Subject	Note	Author	Notifications
Edit	Add time	03/16/2...	Request AAFE-6392 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	02/17/2...	Request AAET-6779 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	02/11/2...	Request AAFC-6526 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	01/23/2...	Request AAET-4821 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	01/21/2...	Request AAET-0364 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	12/13/2...	Request AAEN-7726 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	12/10/2...	Request AAEG-7428 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	12/09/2...	Request AAET-5247 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	12/08/2...	Request AAET-1979 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	12/01/2...	Request AAES-2944 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	11/26/2...	Request AAES-0343 - Dothraki Emergency.	Request Info:	Jared Vis...	—
Edit	Add time	11/24/2...	Request AAER-5910 - Dothraki Emergency.	Request Info:	Jared Vis...	—

Subject
Request AAFE-6392 - Dothraki Emergency Transportation - Medical, Other

Note

Request Info:
Arctrieval ID: AAFE-6392
Healthcare Provider: Dothraki Emergency Transportation
Requested Information: Discharge Summary, Electronic Health Record Audit Trail, History & Physical Exams, Laboratory Reports, Pathology Reports, Problem List, Radiology Reports, Signed Nurses Notes.
Request Type: Patient Directed to 3rd Party
Request Status: Open
Starting Date Of Service: 11/04/2025
Ending Date Of Service: 01/04/2026
Request Date: 02/24/2026
Request Due Date: 03/26/2026
Last Activity Date: 03/16/2026

History:
03/16/2026 08:31 PM Request was successfully linked to the matter in Clio. Matter name: 00035-Stark.
03/11/2026 11:10 AM The delivery was successful for the request or correspondence sent to Dothraki Emergency Transportation at dothraki_rol@m-c-unlimited.com.
03/11/2026 11:09 AM Request due date reminder sent by email to dothraki_rol@m-c-unlimited.com.
03/11/2026 11:09 AM Request due date reminder created. Request due date reminder is to be sent via email.
02/27/2026 10:48 AM The delivery was successful for the request or correspondence sent to Dothraki Emergency Transportation at dothraki_rol@m-c-unlimited.com.
02/27/2026 10:48 AM Request follow-up sent by email to dothraki_rol@m-c-unlimited.com.
02/27/2026 10:48 AM Request follow-up created. Request follow-up is to be sent via email.

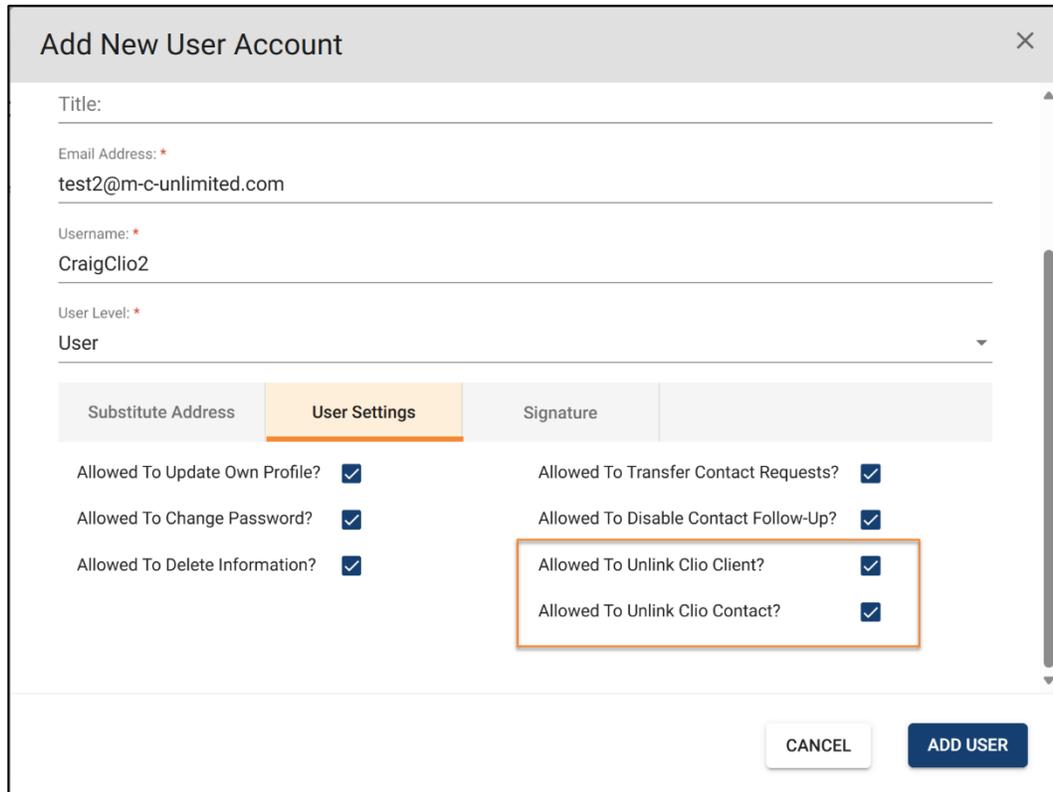
Filed to matter
00035-Stark

Save note Cancel Delete

8. Arctrieval Role-Based Permissions for Clio

When the Clio Integration is active in Arctrieval, additional role-based permissions are available to determine whether or not an Arctrieval User may Unlink a Clio Client or Clio Contact from the respective Client or Contact record in Arctrieval.

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



The screenshot shows a dialog box titled "Add New User Account" with a close button (X) in the top right corner. The form contains the following fields and options:

- Title: (empty)
- Email Address: * test2@m-c-unlimited.com
- Username: * CraigClio2
- User Level: * User (dropdown menu)

Below the form is a tabbed interface with three tabs: "Substitute Address", "User Settings" (selected), and "Signature". Under the "User Settings" tab, there are two columns of permissions, each with a checked checkbox:

Permission	Checked
Allowed To Update Own Profile?	<input checked="" type="checkbox"/>
Allowed To Change Password?	<input checked="" type="checkbox"/>
Allowed To Delete Information?	<input checked="" type="checkbox"/>
Allowed To Transfer Contact Requests?	<input checked="" type="checkbox"/>
Allowed To Disable Contact Follow-Up?	<input checked="" type="checkbox"/>
Allowed To Unlink Clio Client?	<input checked="" type="checkbox"/>
Allowed To Unlink Clio Contact?	<input checked="" type="checkbox"/>

At the bottom right of the dialog box are two buttons: "CANCEL" and "ADD USER".



The permissions to Unlink Clio Client and Unlink Clio Contact are enabled by default.

9. Configuration Notes

9.1. Disabling and Enabling the Integration

If you disable the Clio integration and then re-enable it later, any changes to Request status, files, history, and other information are not automatically updated in Clio while the integration is inactive. You need to manually trigger the update for each request to update information in Clio by using the Update in Clio Active option. Once re-enabled, any new request changes will automatically sync with Clio.

10. Integration Limitations

10.1. Contact Field Limits

As part of an update to the Clio API (version 4.0.13), Clio introduced limits on the number of associated email addresses, phone numbers, and physical addresses that can be stored on a Contact record. This change was made by Clio to standardize how contact data is managed through their API.

Under the current API behavior, each Contact record in Clio can contain up to:

- 20 Email Addresses
- 20 Phone Numbers
- 20 Physical Addresses

These limits apply to all Contact records used by the Clio integration, including records synchronized with Arctrieval.

10.1.1. Impact on Arctrieval Synchronization

Arctrieval synchronizes client and contact information with Clio. If the maximum number of entries for a particular field type has already been reached in Clio, the Clio API will reject any additional updates for that field. When this occurs:

- Arctrieval will skip the update for the affected field.
- A message will appear identifying which fields could not be synchronized.
- The user will be instructed to manually update the information in Clio if needed.

This behavior ensures that synchronization continues without interrupting other updates while respecting the limits enforced by Clio.

10.1.2. User Notification

If the limit is reached, Arctrieval displays a message indicating that Clio's field limits prevented certain information from being synchronized. The notification identifies the specific fields that could not be updated and instructs the user to manually update the information in Clio if necessary.

Example message displayed in Arctrieval when Clio field limits are reached:

