



Arctrieval Legal
Arctrieval <> Filevine Integration Setup Guide

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1. Overview

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

Arctrieval's integration with Filevine is our commitment to our mutual customers. This integration provides additional functionality that not only improves your workflow but also enhances the user experience, making your work more efficient and effective.

When it comes to integrating Arctrieval and Filevine, we offer you two flexible options. This allows you to choose the setup that best suits your needs, giving you the power to control your integration process.

1.1. Required Filevine Permissions

Whoever is setting up the integration must have the following permissions and access in Filevine:

1. Access to the Advanced menu
2. Ability to create service accounts
3. Ability to create Personal Access Tokens
4. Ability to create Subscriptions in Webhook Subscriptions
5. Ability to import sections via Customs Editor

1.2. Required Arctrieval Permissions

1. Administrator user role
2. Integration tab enabled by Arctrieval

1.3. Overview

To enable Filevine 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 Filevine integration feature is only available to firms with a subscription for multiple users. Please contact Arctrieval to activate the feature.
2. Activate the Arctrieval Integration from the Integrations page on the Advanced menu.
3. Create a Personal Access Token in Filevine.
4. On the Arctrieval Integration page, in the Settings menu, you must add a Personal Access Token.
5. Locate your Arctrieval Account ID to use during the integration configuration.
6. Create a Subscription in Filevine for the Arctrieval integration.
6. The Arctrieval fields are added to Filevine Project templates by importing the pre-configured sections or manually entering the data fields into an existing section. There are two options.
 - a. The Arctrieval Client and Arctrieval Request section files (ArctrievalClient.fvst and ArctrievalRequest.fvst) must be imported into a Filevine Project template.
 - b. Required Arctrieval data fields must be added to an existing section in a Filevine project template to submit requests and mapped to Arctrieval. The same Section Selector and Field Selector values must be used across all the Filevine project templates.

1.4. Set up Option 1: Standard Configuration

In the baseline configuration, you will enter Filevine Personal Access Token into Arctrieval, create a subscription, and import the pre-built Arctrieval Client and Arctrieval Request sections into one or more Filevine Project templates. The Arctrieval Client and Arctrieval Request sections operate independently of the other Filevine Project templates.

If you can access the API Credentials in the Advanced Menu and the Import/Export functionality in the Customs Editor, setting up the default configuration should take about 15 minutes.

1.5. Set up Option 2: Custom Configuration

In the custom configuration, you will enter the Filevine Personal Access Token into Arctrieval, create a subscription, and enter Arctrieval-specific fields into the desired sections in a Filevine project template, and adjust the mapping in Arctrieval.



An experienced Filevine System Administrator or Filevine Integration partner should set up a custom configuration. If you need assistance with a custom integration, Arctrieval is happy to introduce you to a Filevine Integration partner. Arctrieval does not have the advanced knowledge to assist with a custom configuration.

2. Functionality Overview

Arctrieval's integration provides the following functionality between the two systems.

1. Client Information
 - a. Import Filevine Client information from the Filevine Address Book into an Arctrieval Client record through the Arctrieval Add Client process. One client is added from Filevine to Arctrieval at a time.
 - b. Pull updated Filevine Client information from Filevine Address Book into the Arctrieval Client record through the Arctrieval Client Activity Update From Filevine process. Client information is updated in Arctrieval one Client at a time.
 - c. Push updated Arctrieval Client information from Arctrieval Client records to Filevine Address Book 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 Filevine Client information in the Filevine Address Book.
 - d. Link an existing Arctrieval Client record with an existing Filevine Client in the Filevine Address Book.
 - e. Remove the link between Filevine Client information from Filevine Address Book and Arctrieval Client record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
2. Medical Provider Information (Arctrieval Contact)
 - a. Import Filevine Medical Provider information from the Filevine Address Book into an Arctrieval Contact record through the Arctrieval Add Contact process. Each medical provider is added from Filevine to an Arctrieval Contact one at a time.
 - b. Pull updated Filevine Medical Provider information from Filevine Address Book into the Arctrieval Contact record through the Arctrieval Contact Activity Update From Filevine process. Contact is updated in Arctrieval one at a time.
 - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to a medical provider in the Filevine Address Book through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Filevine Medical Provider information in the Filevine Address Book.
 - d. Link existing Arctrieval Contact record with an existing Filevine Medical Provider in the Filevine Address Book.
 - e. Remove the link between Filevine Medical Provider information from Filevine Address Book and Arctrieval Contact record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
3. Submit Record Requests from Filevine to Arctrieval
 - a. Any Filevine User can send a record request from Filevine to Arctrieval for processing by the attorney's medical record team.
 - b. Requests are reviewed by the attorney's medical record team in Arctrieval and released for delivery to the healthcare provider or covered entity.
4. Link existing Arctrieval Requests to an existing Filevine Project
 - a. If a request is started, created, and sent through Arctrieval, the request can be linked to an existing Filevine Project.
5. Data synchronization between Arctrieval and Filevine
 - a. All Arctrieval request activities are reported back to the request in Filevine.
 - b. All Arctrieval history entries are reported back to the request in Filevine
 - c. All documents created or uploaded in Arctrieval are uploaded to the request and project document folder in Filevine.

3. Document Change History

Date	Document Revision	Description of Changes
7/15/2023	1.0	Initial Document.
7/15/2023	1.1	Request expense field information added, notice for Arctrieval Client section added, notice about Filevine data validation for State in address.
8/5/2023	1.2	Information about API Key access and Customs Editor Import/Export tool.
8/25/2023	1.3	Revised information about Scope requirements. Subscriptions: Read and Subscriptions: Update are needed.
11/15/2023	1.4	Added information for contact field support between Filevine organization contact type and Arctrieval Contact.
5/29/2024	1.5	Revised information on how to access Filevine keys, additional explanation about the Baseline and Custom Configurations, and document refinement.
3/20/2025	1.6	PAT Authentication setup instructions added. API Key setup instructions removed. Update to adding Arctrieval Department to Filevine
3/27/2025	1.7	Added information about Auto-move folder set up and configuring multiple Filevine Orgs
4/17/2025	1.8	Support for multiple Contact Types in Filevine. Mapping multiple Contact Types to Client and Contact records in Arctrieval.
6/20/2025	1.9	New functionality to create Request sub-folders in Docs or specified Auto-move to Folder.
6/25/2205	2.0	Added information on how to set up a service account for Arctrieval.
7/6/2025	2.1	Updated required fields in Request Section
9/15/2025	2.2	Updated naming for Arctrieval Field Name for Files & Documents and Correspondence.
11/16/2025	2.3	Where to find Arctrieval Account ID
11/25/2025	2.4	Webhook Subscriptions replaces API Credentials and Subscriptions
12/24/2025	2.5	Additional Client Document support added to Arctrieval Client Section
2/2/2026	2.6	Additional information for cover letter added to Arctrieval Request Section Sex assigned at Birth added to Arctrieval Client Section

4. Existing Integrations—Updating to Personal Access Token

For existing customers using a dedicated API key, the Arctrievail Attorney Firm Administrator will see the following page when clicking on the Integrations tab in the Settings menu. The process for replacing the API key with a Personal Access Token is the same for a new integration.

Click Update Filevine Access Token to start the process, then follow the directions below.

FILEVINE INTEGRATION

API Key: fvpk..._6a039

API Secret: fvsik..._0f9d3

Base Filevine URL: https://sandbox.api.filevineapp.com/

Last Updated On: 05/13/2024

Is Filevine Contact Additional Fields Used: No

Sections and Fields

Filevine Section Selector	Filevine Field Selector	Arctrievail Section	Arctrievail Field Name	
arctrievail/Client	arctrievail/ClientLast4SSN	Client	Last 4 of SSN	EDIT
arctrievail/Client	arctrievail/ClientAliases	Client	Aliases	EDIT
arctrievail/Client	arctrievail/LanguagePreference	Client	Language Preference	EDIT
arctrievail/Client	arctrievail/PatientPhotoID	Client	Patient's Photo ID	EDIT
arctrievail/Client	arctrievail/IntakeForm	Client	Arctrievail Intake Form	EDIT
arctrievail/Client	arctrievail/PersonalRepresentativeBoolean	Client	Is The Client A Minor, Have A Legal Guardian Or Personal Representative?	EDIT
arctrievail/Client	arctrievail/PerRepFirstName	Client	Personal Representative First Name	EDIT
arctrievail/Client	arctrievail/PerRepLastName	Client	Personal Representative Last Name	EDIT
arctrievail/Client	arctrievail/PersonalRepRelationship	Client	Personal Representative Relationship	EDIT
arctrievail/Client	arctrievail/PersonalRepOther	Client	Personal Representative Relationship Other Description	EDIT

Option for existing customers to update authentication API Credentials from API keys to Personal Access Tokens.

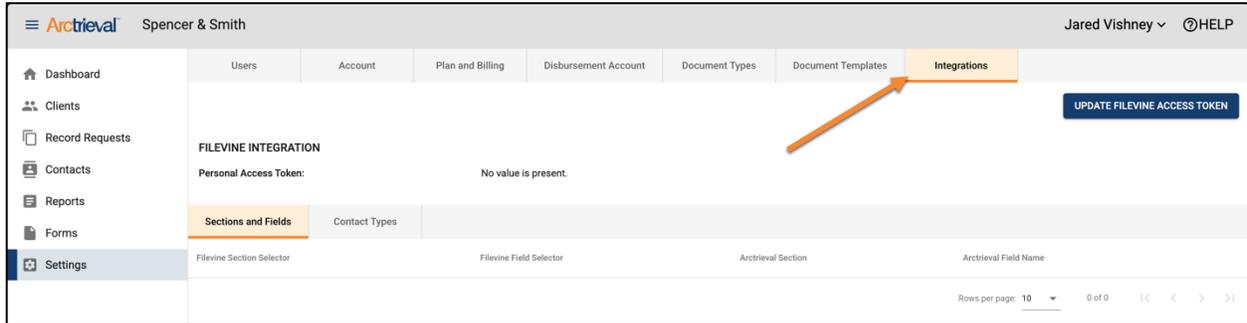


Once you configure Arctrievail’s integration using a Personal Access Token, you cannot go back to using an API key.

The process to convert from using API Credentials to using a Personal Access is the same as setting up a new integration without the need to enter information in the Customs Editor. To continue the update to using a Personal Access Token follow the process outlined below starting in Section 6 and Section 7.

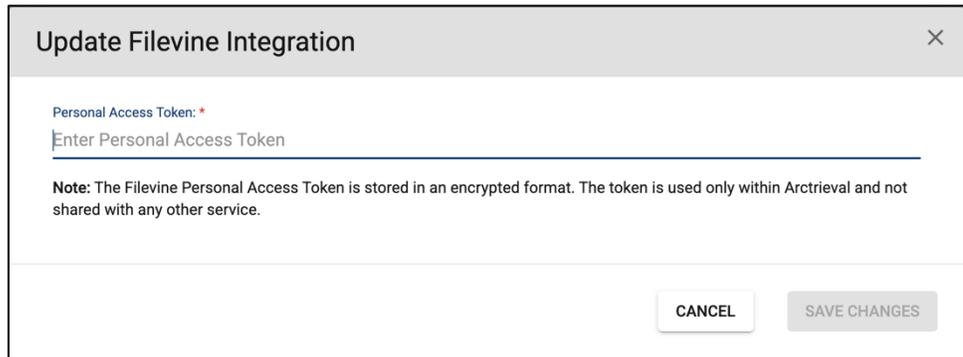
4.1. Establishing the Link Between Filevine and Arctrieval

Once the Filevine 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 Filevine Access Token button displays the dialog box in the image.

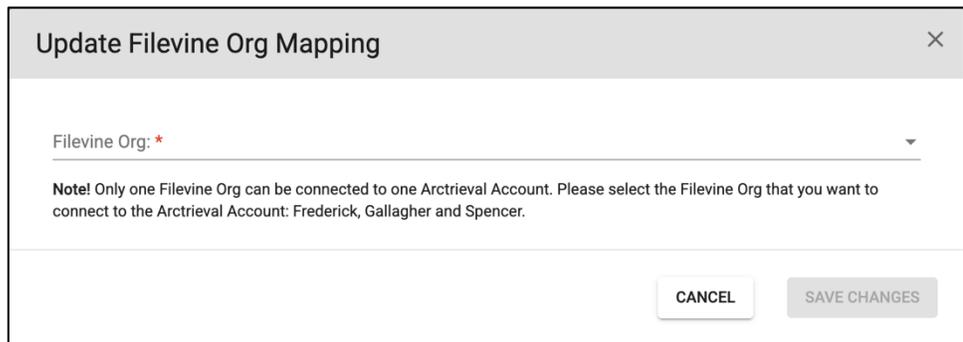
The Personal Access Token is available through your Filevine account.



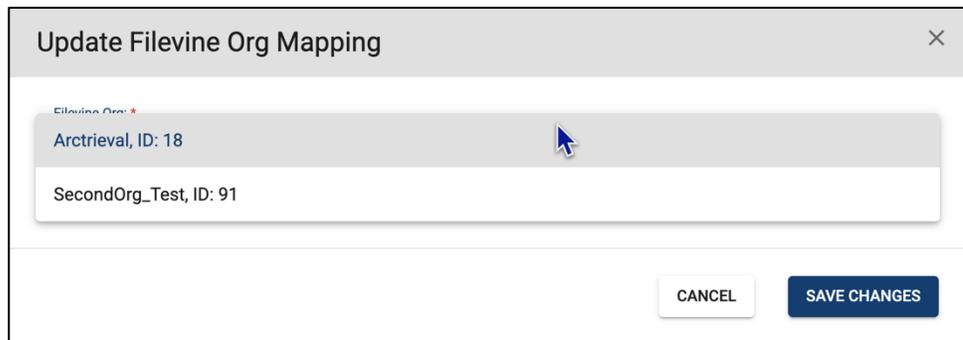
To continue the update to using a Personal Access Token follow the process outlined below starting in Section 6.

4.2. Filevine Org Mapping (Optional)

Each Arctrieval account can only be linked to one Filevine Org. If your Filevine Account has multiple Orgs, you must choose which organization to connect with your Arctrieval account. As part of the integration setup, the following dialog box is displayed if Arctrieval detects more than one Org in your account.



Select the Filevine Org from the dropdown list and click the Save Changes button.

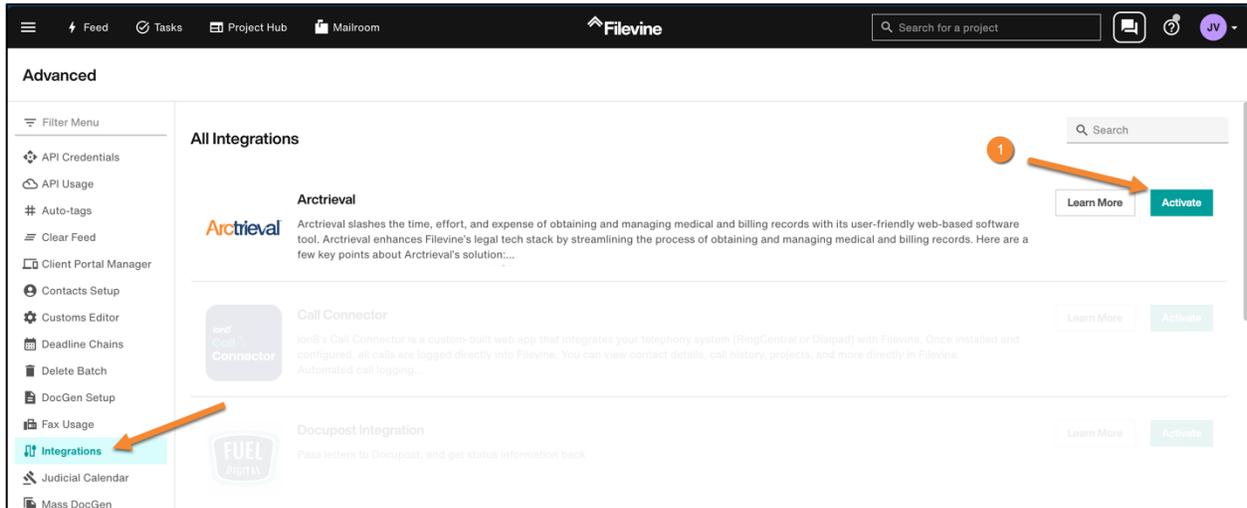


5. Activating the Arctrieval Integration

Sign in to your Filevine account and navigate to the Integrations section in the Advanced menu. If you do not see the Integrations tab, you must get additional permissions for your Filevine User Account or have your firm’s Filevine Administrator continue the process.

5.1. Activate Integration

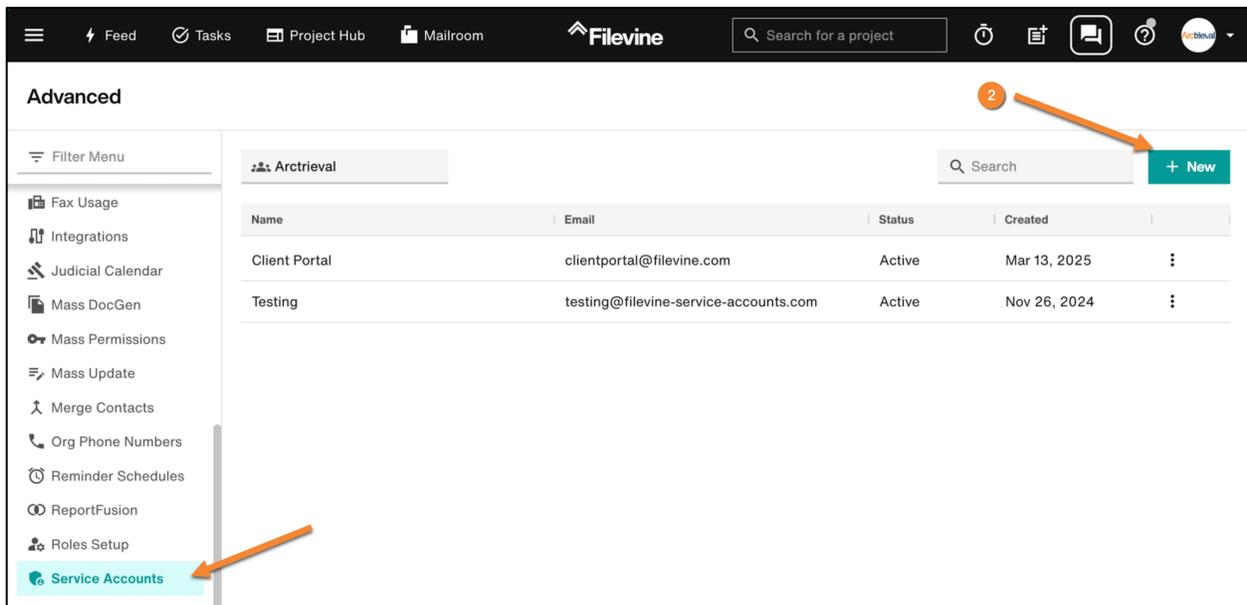
Navigate to Integrations in the Advanced menu options to display the Arctrieval integration.



1. Click Activate to enable the Arctrieval integration with Filevine. Activating the integration allows it to connect with your environment. This authorization is intentionally independent from the subsequent steps, because it shows that the Account Admin has expressly authorized the integration.

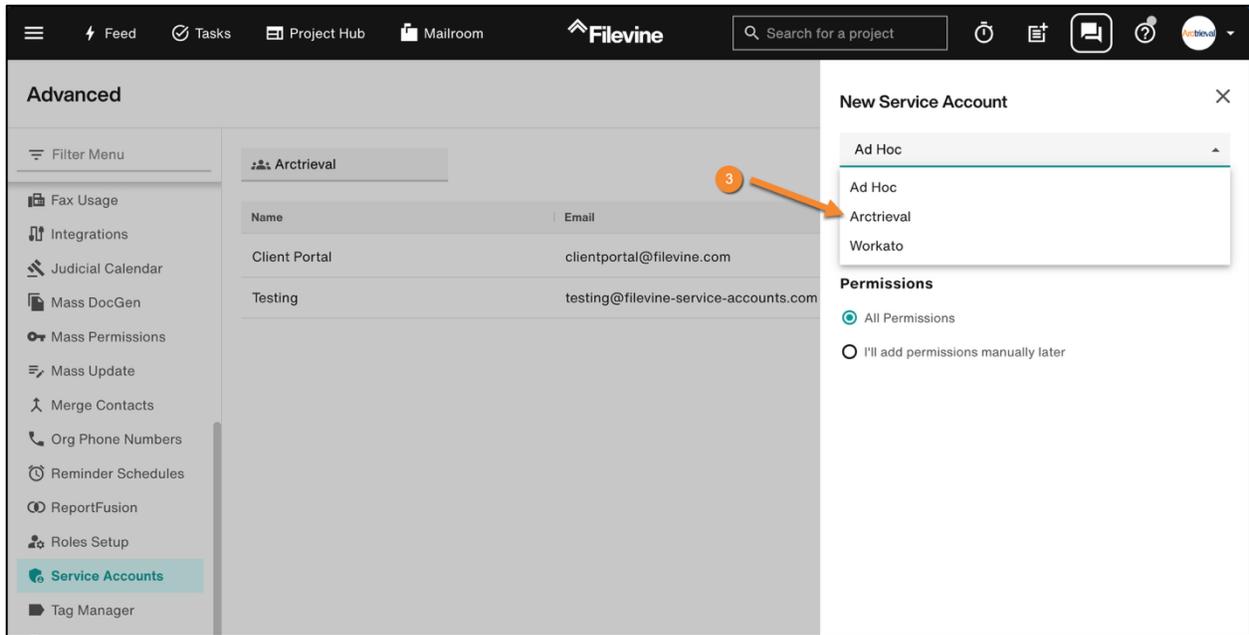
5.2. Create Service Account

Navigate to the Service Accounts in the Advanced menu options as shown.



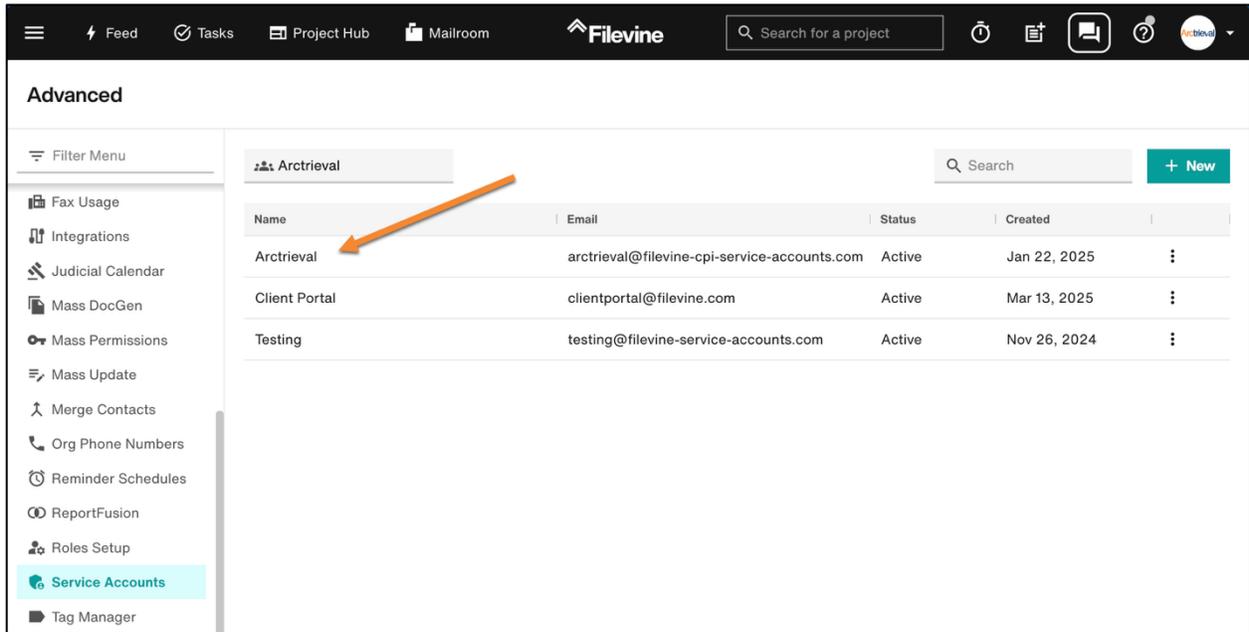
2. Click the + New Button to create a new service account.

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3. In the dropdown field, select Arctrieval and make sure the All Permissions radio button is selected.

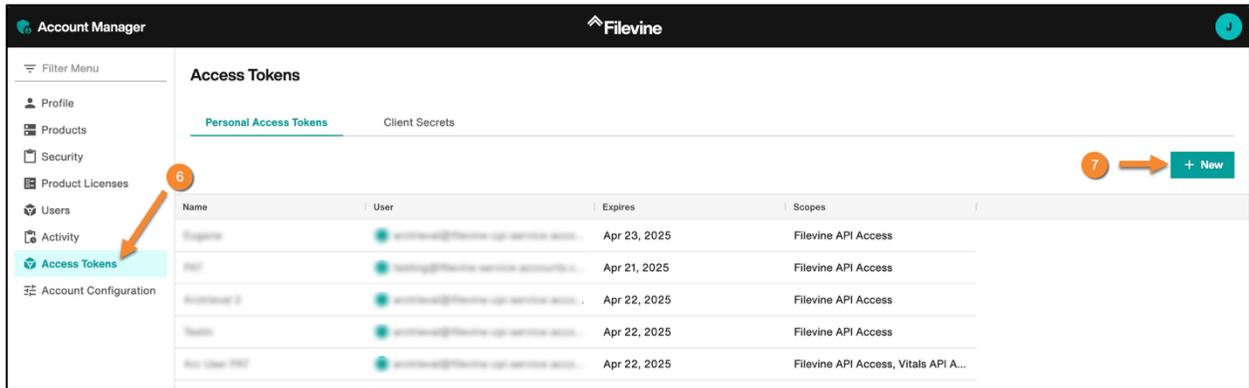
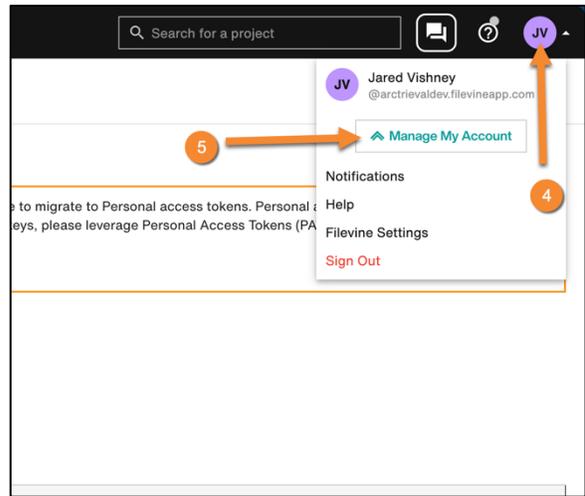
You should now see a service account named Arctrieval in the list as shown in the image.



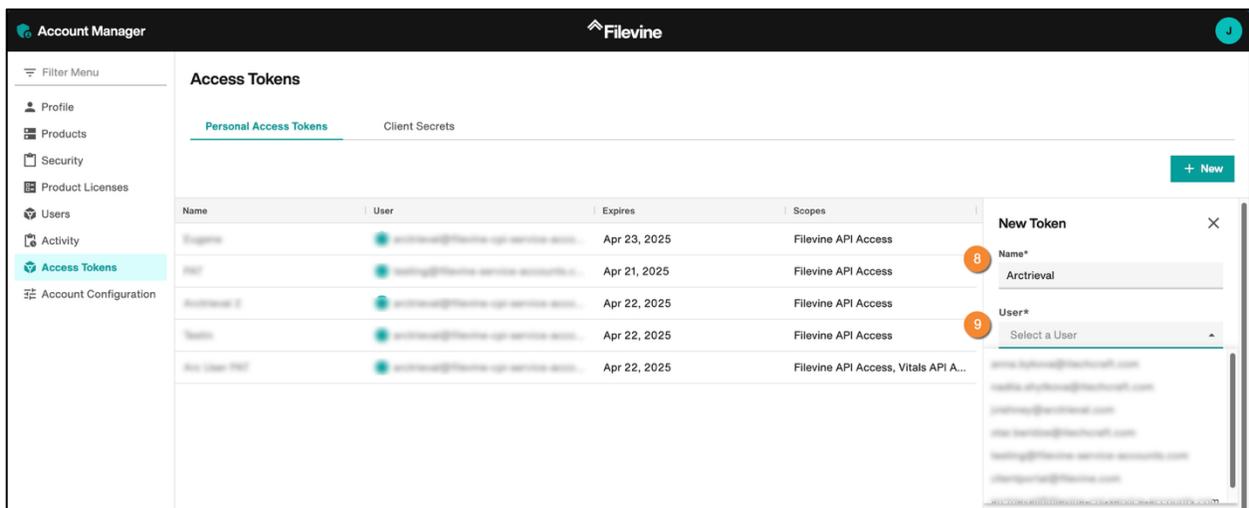
5.3. Create and Enter Personal Access Token

You will now need to navigate to the Account Manager page.

4. Clicking on your user button in the upper right corner of the Filevine Application
5. Clicking on Manage My Account

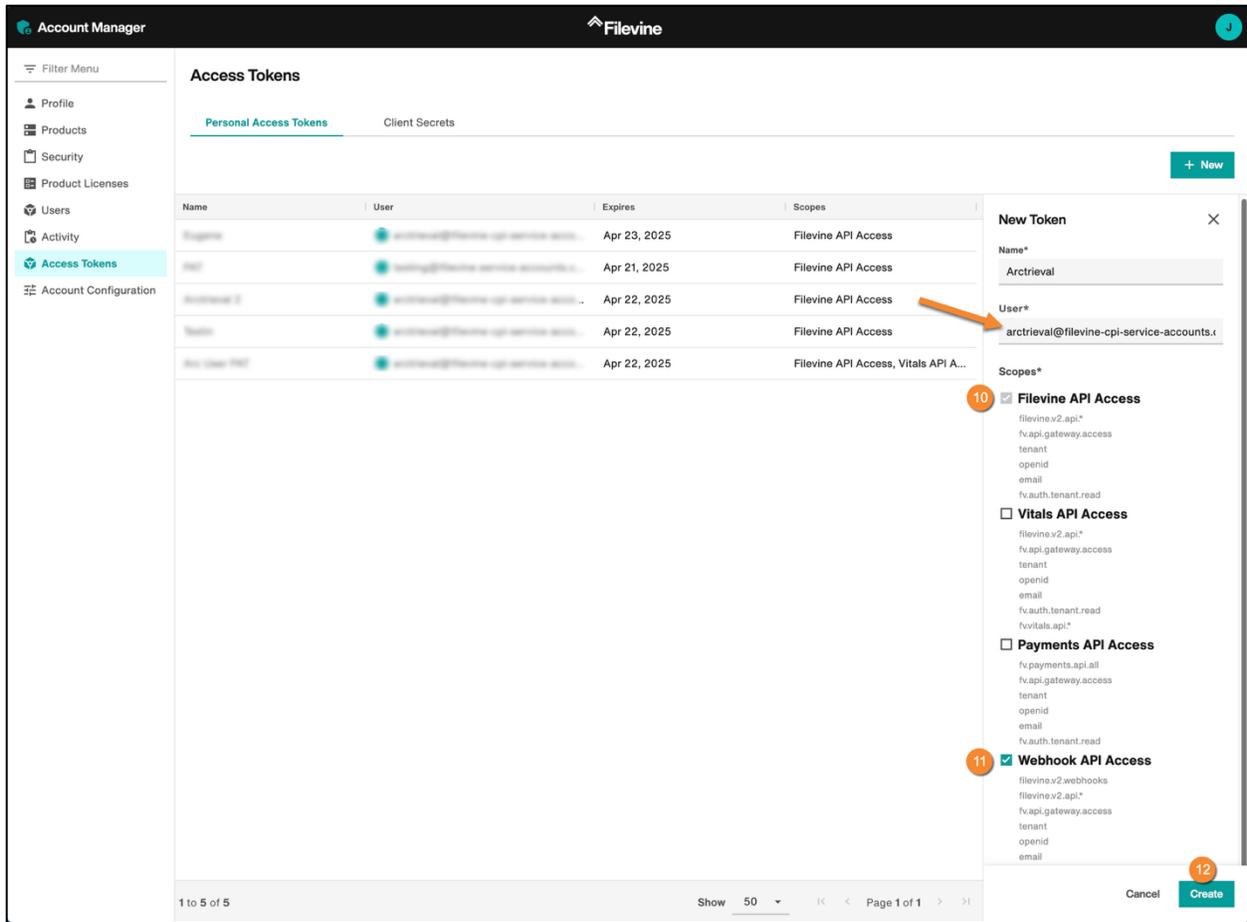


6. Click on Access Tokens in the Account Manager menu.
7. Click on + New.

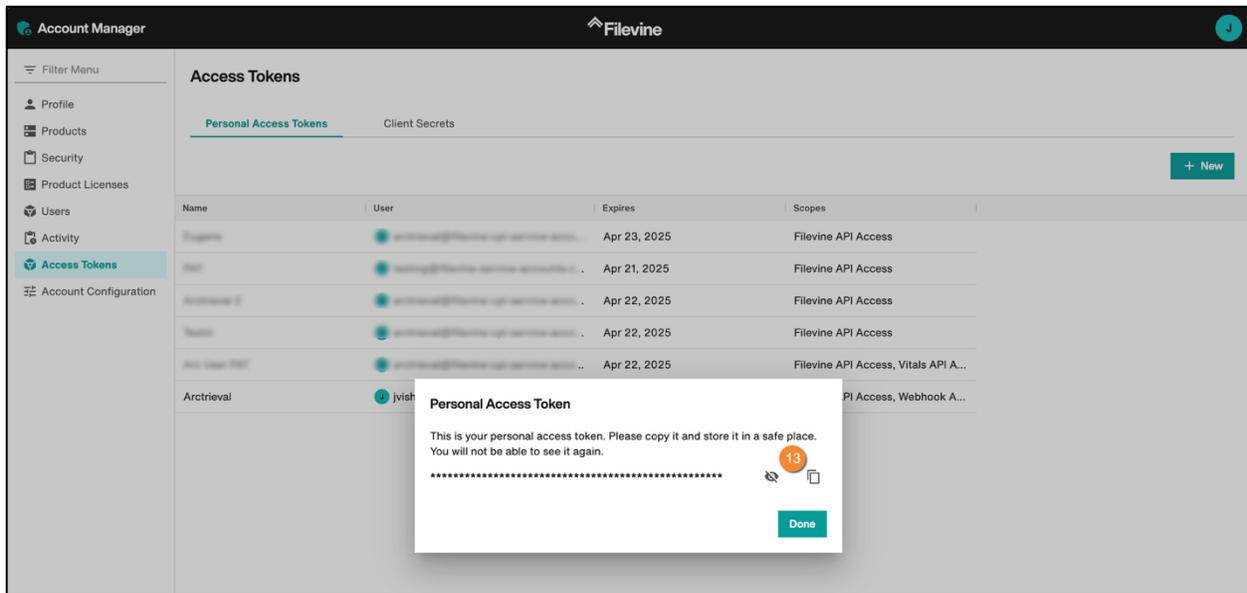


8. Enter a Name for the Token
9. Select the arctrieval@filevine-cpi-service-accounts.com User from the list for the Token.

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10. Enable Filevine API Access
11. Enable Webhook API Access
12. Click on Create



13. Click on the Copy Icon to obtain the value of the Personal Access Token.



The Personal Access Token should be copied to a secure document or location. The Personal Access Token is only available at the time it is first created. If you lose or forget the Personal Access Token, you will have to create a new one in the future.

Update Filevine Integration ✕

Personal Access Token: *

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Note: The Filevine Personal Access Token is stored in an encrypted format. The token is used only within Arctrieval and not shared with any other service.

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CANCEL
SAVE CHANGES

14. Return to the Arctrieval web page from the steps above and paste the Personal Access Token into the field.
15. Click the Save Changes button.

After entering the correct Personal Access Token and clicking the Save Changes button, the following web page in the image is displayed.

Arctrieval Spencer & Smith
Jared Vishney ▼ 🔗 HELP

- Dashboard
- Clients
- Record Requests
- Contacts
- Reports
- Forms
- Settings

Users
Account
Plan and Billing
Disbursement Account
Document Types
Document Templates
Integrations

ENABLE ADDITIONAL CONTACT FIELD
RESET MAPPING
UPDATE FILEVINE ACCESS TOKEN
TEST FILEVINE LINK
REMOVE FILEVINE ACCESS TOKEN
ADD CONTACT TYPE

FILEVINE INTEGRATION

Personal Access Token: A0AEB...62FAD

Organization: Arctrieval, ID: 18

Last Updated On: 04/17/2025

Is Filevine Contact Additional Fields Used: No

Sections and Fields

Contact Types

Filevine Section Selector	Filevine Field Selector	Arctrieval Section	Arctrieval Field Name	
arctrievalClient	arctrievalClientLast4SSN	Client	Last 4 of SSN	EDIT
arctrievalClient	arctrievalClientAliases	Client	Aliases	EDIT
arctrievalClient	arctrievalLanguagePreference	Client	Language Preference	EDIT
arctrievalClient	arctrievalPatientPhotoID	Client	Patient's Photo ID	EDIT
arctrievalClient	arctrievalIntakeForm	Client	Arctrieval Intake Form	EDIT
arctrievalClient	arctrievalPersonalRepresentativeBoolean	Client	Is The Client A Minor, Have A Legal Guardian Or Personal Representative?	EDIT
arctrievalClient	arctrievalPerRepFirstName	Client	Personal Representative First Name	EDIT
arctrievalClient	arctrievalPerRepLastName	Client	Personal Representative Last Name	EDIT
arctrievalClient	arctrievalPersonalRepRelationship	Client	Personal Representative Relationship	EDIT

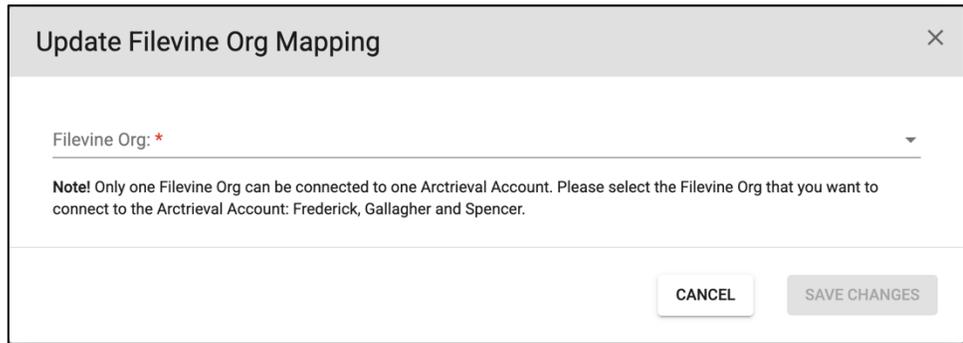
Arctrieval Document Copyright © 2023-2025
For Arctrieval customer and partner users only.

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February 3, 2026

5.4. Filevine Org Mapping (Optional)

Each Arctrieval account can only be linked to one Filevine Org. If your Filevine Account has multiple Orgs, you must choose which organization to connect with your Arctrieval account. As part of the integration setup, the following dialog box is displayed if Arctrieval detects more than one Org in your account.



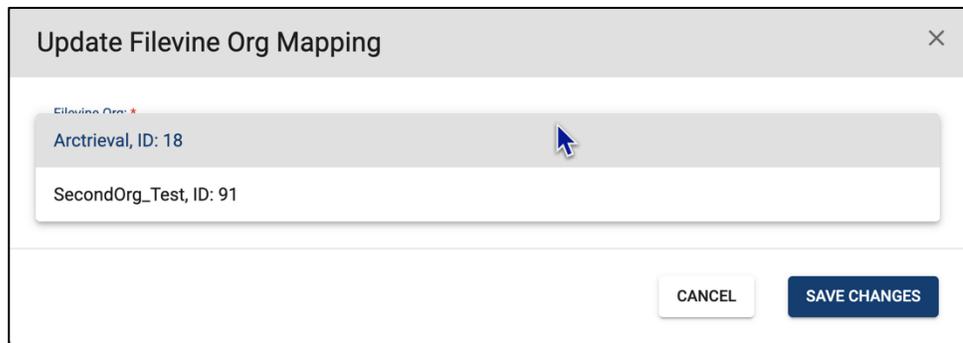
Update Filevine Org Mapping

Filevine Org: *

Note! Only one Filevine Org can be connected to one Arctrieval Account. Please select the Filevine Org that you want to connect to the Arctrieval Account: Frederick, Gallagher and Spencer.

CANCEL SAVE CHANGES

Select the Filevine Org from the dropdown list and click the Save Changes button.



Update Filevine Org Mapping

Filevine Org: *

Arctrieval, ID: 18

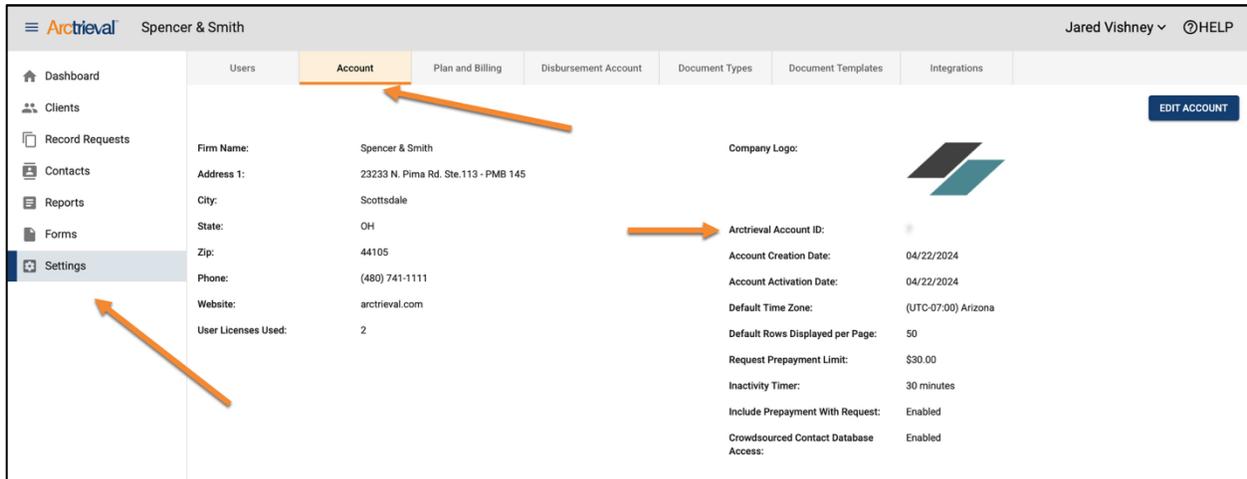
SecondOrg_Test, ID: 91

CANCEL SAVE CHANGES

6. Configuring Subscriptions in Filevine

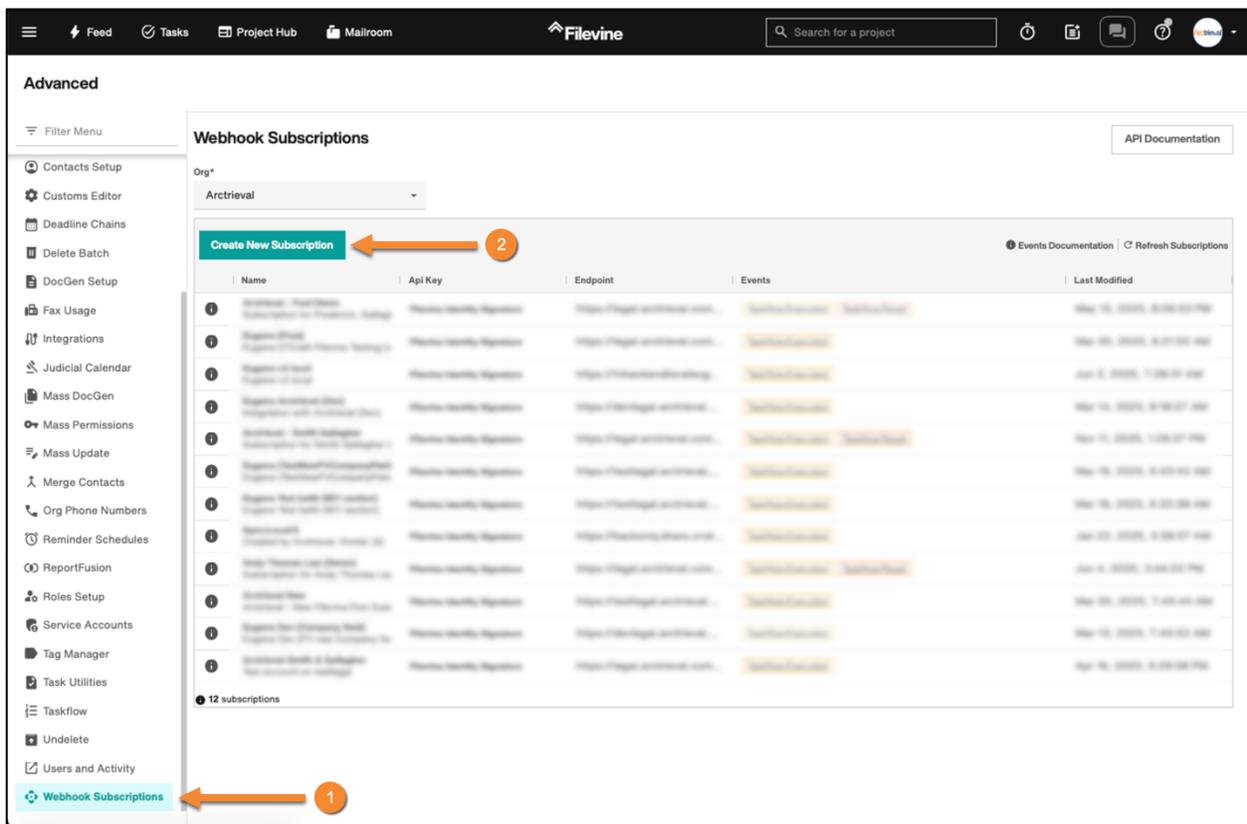
6.1. Obtaining Arctrievall Account ID

Click on Settings in the left-hand menu and then the Account tab to locate your Arctrievall Account ID as shown in the image. Write down your Arctrievall Account ID to use in the next steps.

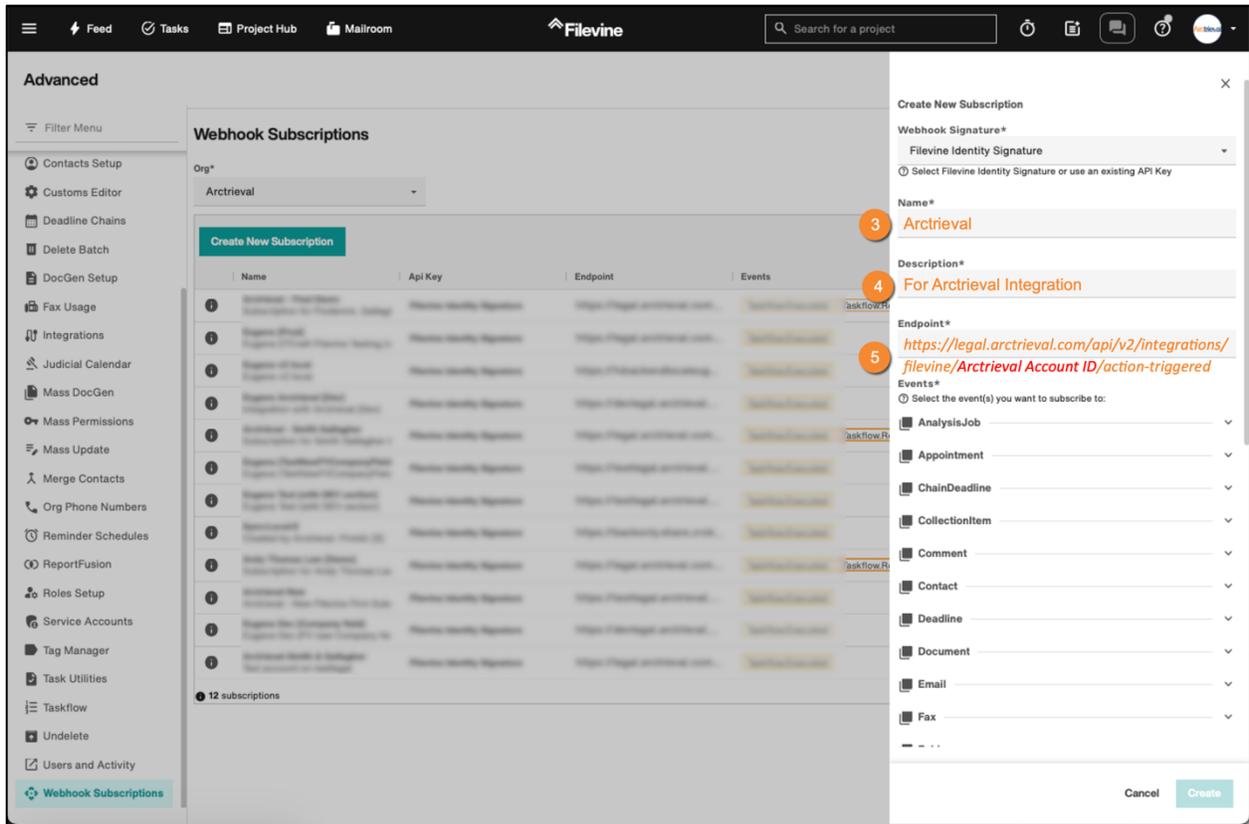


6.2. Creating Subscription

Navigate to the Webhook Subscriptions section in the Advanced menu to display the following.



1. Click on the Webhook Subscriptions tab.
2. Click the Create New Subscription button.



3. Enter a Name for the Subscription. We suggest, “Arctrievial.”
4. Enter a Description for the Subscription. We suggest, “For Arctrievial Integration.”
5. Enter the Endpoint URL using the following structure:
<https://legal.arctrievial.com/api/v2/integrations/filevine/{ArctrievialAccountID}/action-triggered>

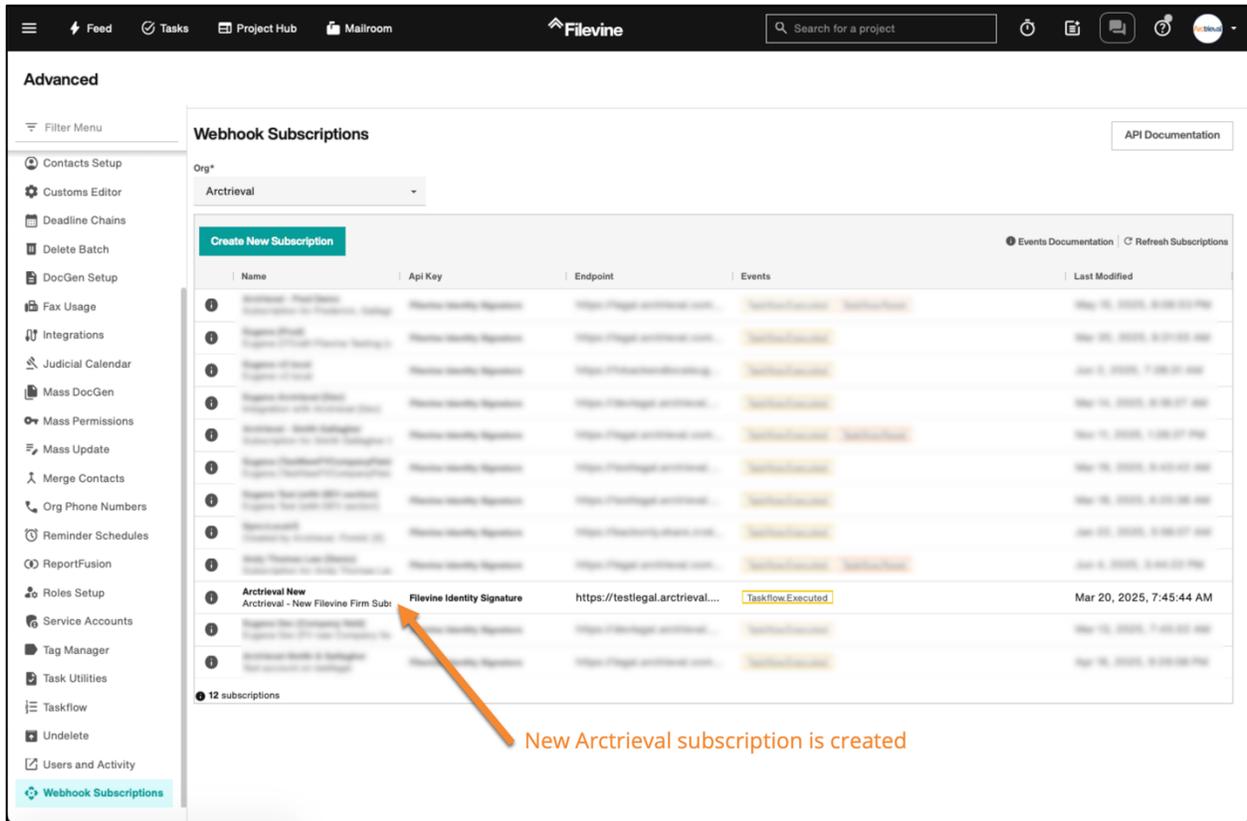


The *Arctrievial Account ID* value was obtained in the previous step.



6. Scroll down the Events list to the Taskflow item and open the dropdown.
7. Click the button to enable Executed and Reset.
8. Click the Create button.

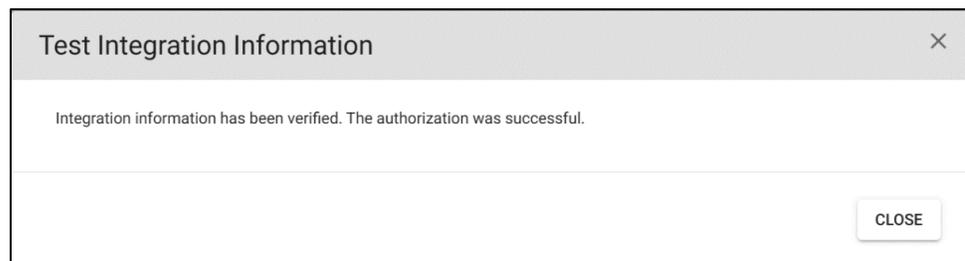
After clicking Create, the following web page in the image is displayed.



6.3. Test Filevine Link

Clicking the Test Filevine Link button verifies that Arctrieval can communicate with the Filevine account based on the provided Personal Access Token and subscription. If the test is successful, the dialog box is displayed, as shown in the image.

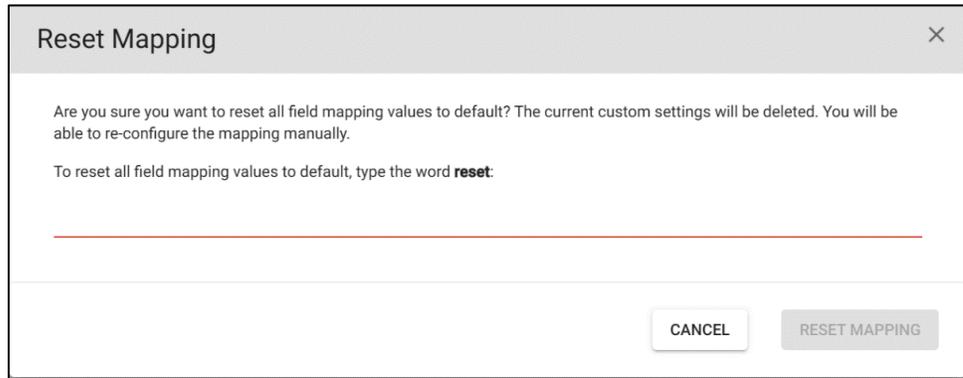
If the test fails, please start troubleshooting the issue by updating the Personal Access Token entered into Arctrieval and testing the Filevine Link.



6.4. Reset Mapping

Clicking the Reset Mapping button displays the dialog box shown in the image.

The Reset Mapping function resets custom values entered as the Filevine Section Sector and Filevine Field Selector to the Arctrieval default values. Once the values are reset, it cannot be undone.



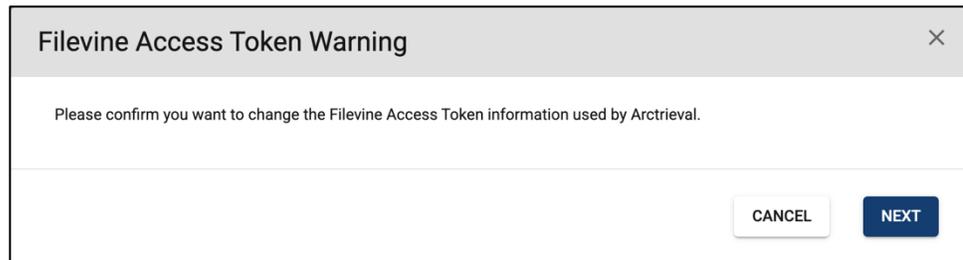
Any custom values must be re-entered into Arctrieval. To reset the values to default, type the word reset as indicated and click the Reset Mapping button.

 Once the values are reset, they cannot be undone. Any custom values must be re-entered into Arctrieval.

6.5. Update Filevine Access token

If a valid connection between Filevine and Arctrieval exists, clicking the Update Filevine Access Token button displays the dialog box in the image.

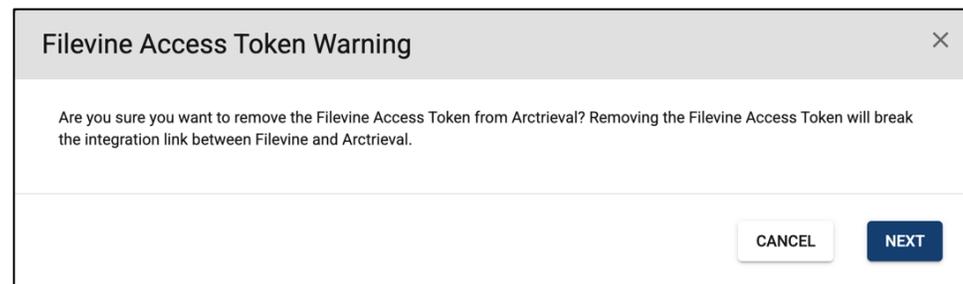
Clicking the Next button displays the Update Filevine Access Token dialog box. This should only be used if there was an error in the original values when the link between Filevine and Arctrieval was first established or if the Filevine account is migrating to a new instance.



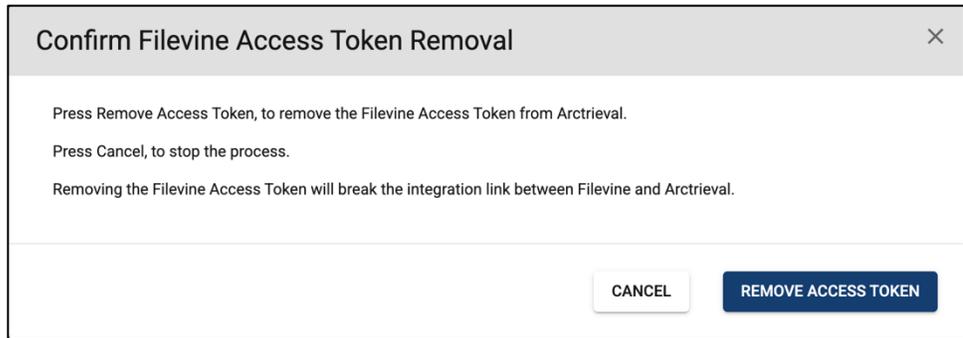
6.6. Remove Filevine Access Token

Clicking the Remove Filevine Access Token button displays the Filevine Access Token Warning dialog box, as shown in the image.

To continue, press the Next button, which will display the Confirm Filevine Access Token dialog box, as shown in the image.



Clicking the Remove Filevine Access Token button will break the integration link between Filevine and Arctrieval.

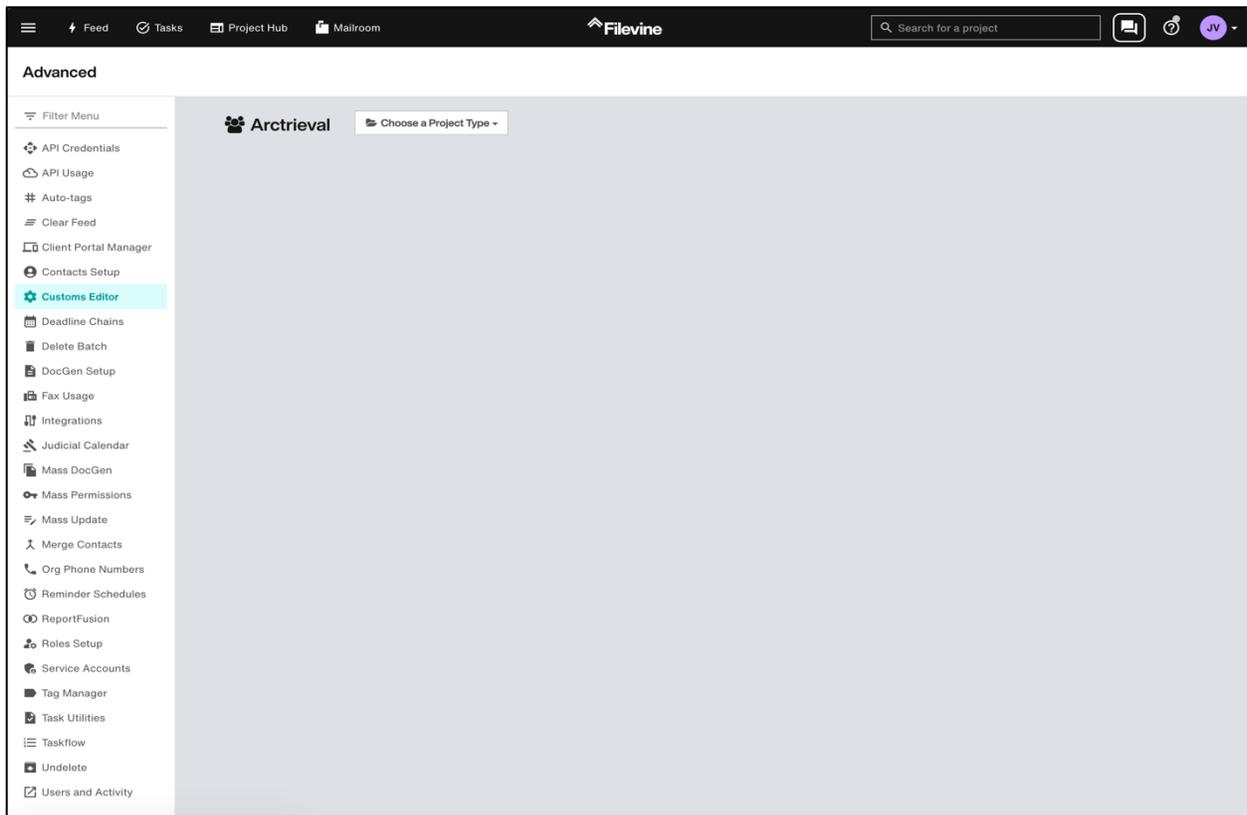


7. Standard Project Template Configuration

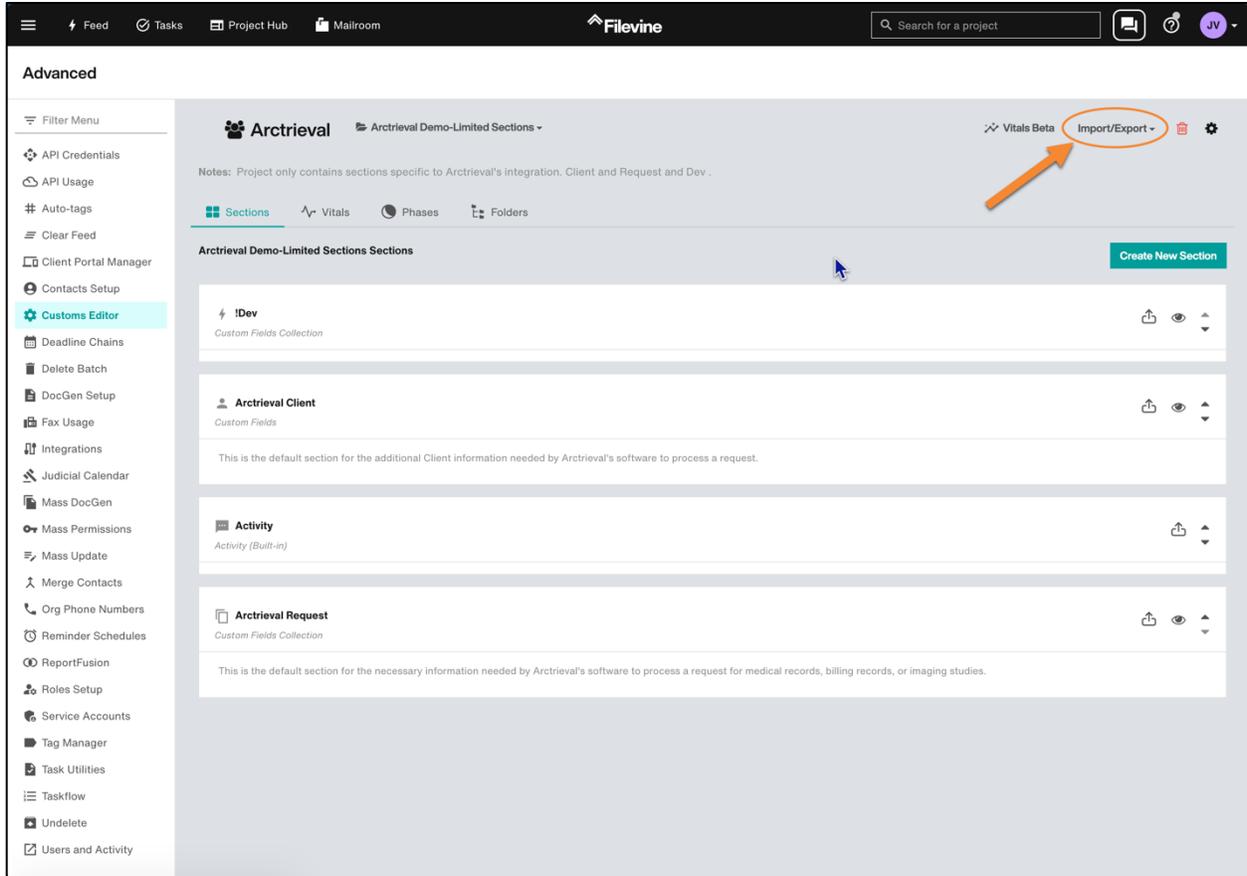
To move data between Filevine and Arctrieval, data fields must be added to sections for a Filevine Project Template and mapped to the appropriate data fields in Arctrieval. The Firm Filevine Administrator adds the necessary data fields and modifies the Filevine Account.

To use the default mapping settings, the ArctrievalClient.fvst, and ArctrievalRequest.fvst files must be imported into at least one Filevine Project template. They may be imported into every Filevine Project template that requires records for the case or claim. The following steps walk you through importing the files into your Filevine Project templates.

1. Log into your Filevine account. The account must have permission to edit sections of a Filevine project.
1. Go to the Advanced page.
2. In the left-hand menu, select Customs Editor. If you do not see the Advanced page or Customs Editor menu options, contact your Filevine system administrator or Filevine support to gain access to the necessary Filevine Functionality.
3. In the Choose a Project Type drop-down list, select the Project Type where you want to add the integration with Arctrieval.
4. Select Import Sections into: '<Selected Project Type>' from the Import/Export drop-down list. as shown in the image.



5. Click the Choose Import File button and select a file with the .fvst extension. The step must be done for the ArctrievalClient.fvst and ArctrievalRequest.fvst files.
6. As shown in the image, the Arctrieval Client and Arctrieval Request sections are added to the Project section list after importing the configuration files. The Arctrieval Client and Arctrieval Request are used to gather information to submit Record Requests from Filevine to Arctrieval.



If you do not see Import/Export as part of the Customs Editor in your Filevine account, you must contact Filevine Support or your Filevine Account Manager to enable the tool.



Alternatively, you can provide the .fvst files to Filevine and ask them to import the Arctrieval Client and Arctrieval Request sections in to each Project Template.

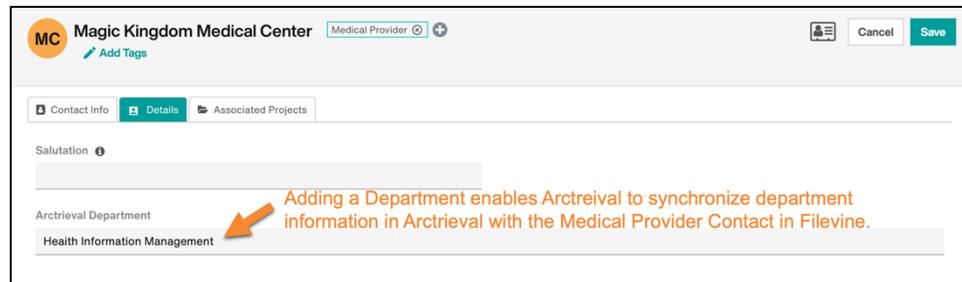
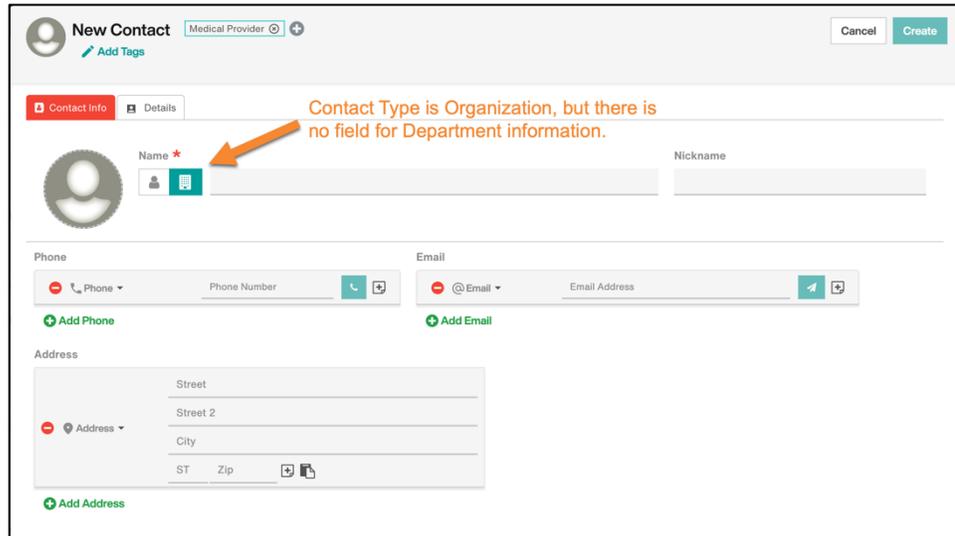
If you still need assistance, please contact Arctrieval Support, and we can introduce you to a Filevine Consulting partner.

8. Additional Contact Field Used for Organizations (Optional)

Arctrieval can manage information about the department for a Medical Provider Contact in the Filevine Address Book when the contact in Filevine is an organization and not an Individual. When you select an organization as the contact in Filevine, there is no default location to store information about a department.

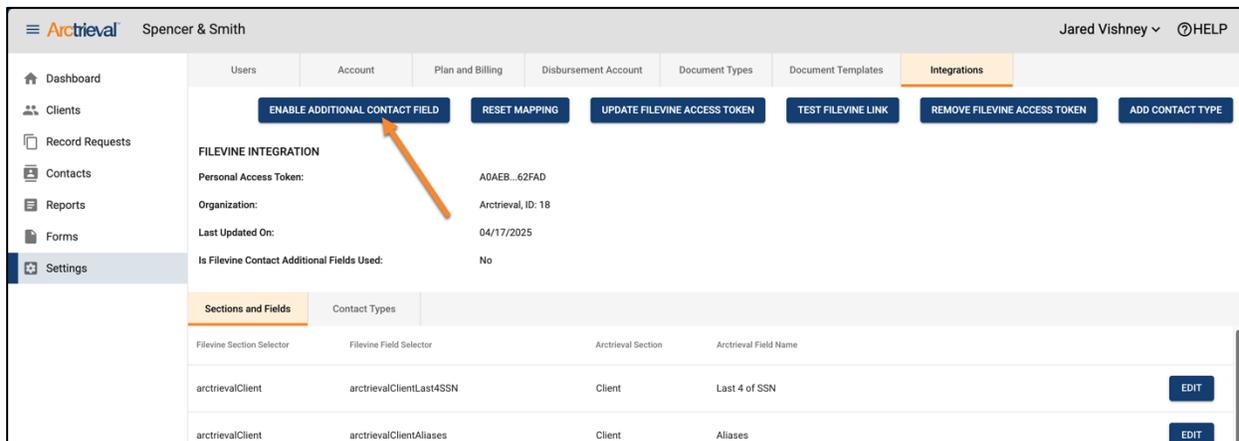
Enabling the Additional Contact Field Option and adding a field to the Contact Card will cause Arctrieval to synchronize the Department name for an Arctrieval Contact on the Filevine contact card.

The second image displays the information for the “Billing and Medical Records” department synchronized between Arctrieval and Filevine.



8.1. Enabling Department Field in Arctrieval

The first step is to enable the Additional Contact Field in Arctrieval by going to Settings -> Integrations and clicking the Enable Additional Contact Field button, as shown in the image.



arctrievalRequest	arctrievalRequestExpensesList	Request	Request Expenses List (All date values shown are in UTC time zone)	EDIT
arctrievalRequest	arctrievalRequestExpensesTotal	Request	Request Expenses Total	EDIT
	arctrievalDepartment	Contact	Department	EDIT

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An additional field is added to the field mapping table, as shown in the image.

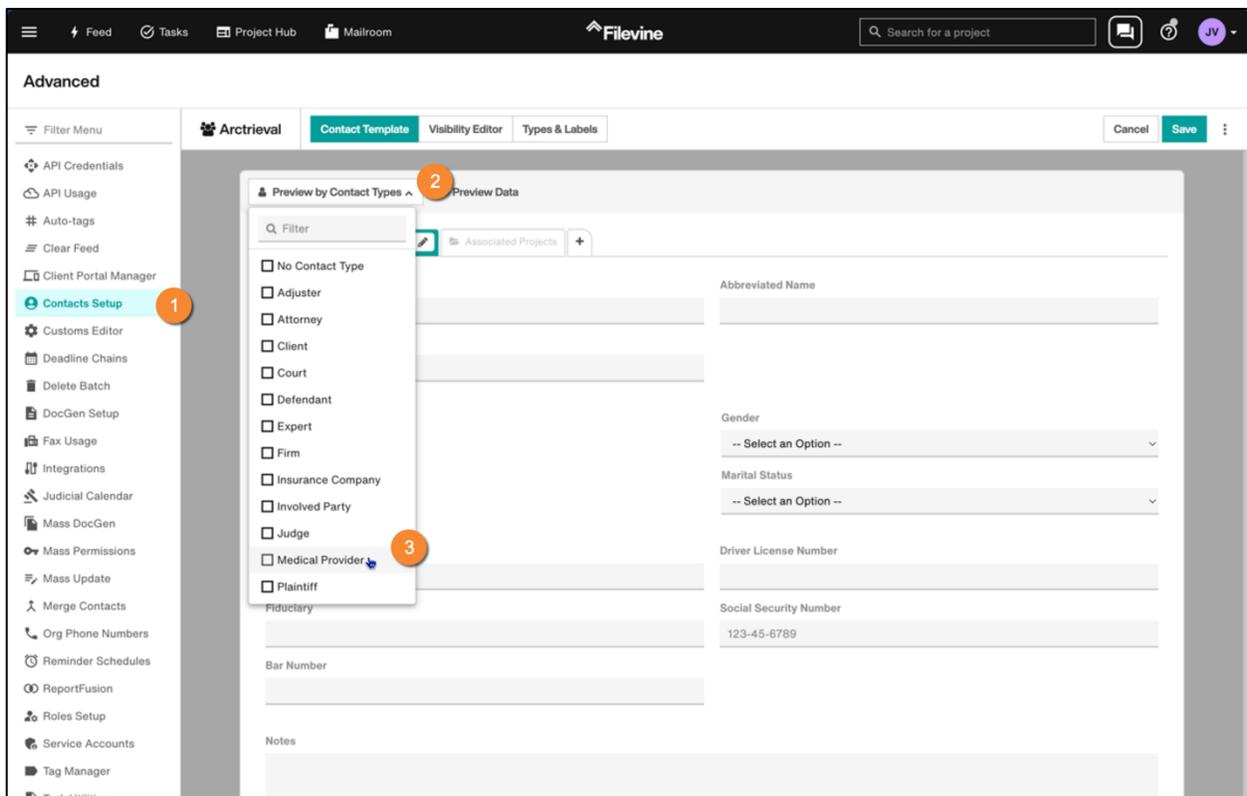
The field has the following default properties:

7. Filevine Field Selector is arctrievalDepartment
8. Arctrieval Section is Contact
9. Arctrieval Field Name is Department

If you already have a field for a Medical Provider Department on the Contact Card, you can change the Filevine Field Selector value by clicking the Edit button and entering the existing value.

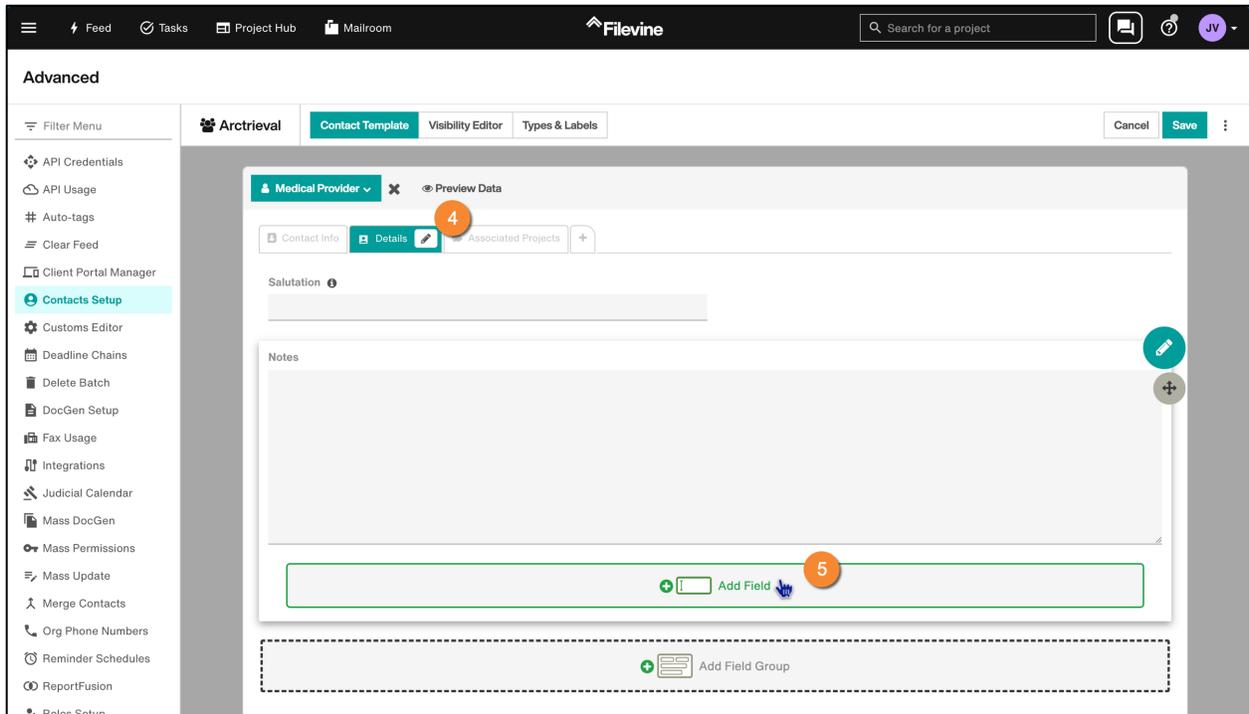
8.2. Adding Department Field to Filevine

Sign in to your Filevine account and navigate to the Contacts Setup tab in the Advanced menu. If you do not see the Contacts Setup menu you will need to get additional permissions for your Filevine User Account or have your firm's Filevine Administrator complete the following steps.

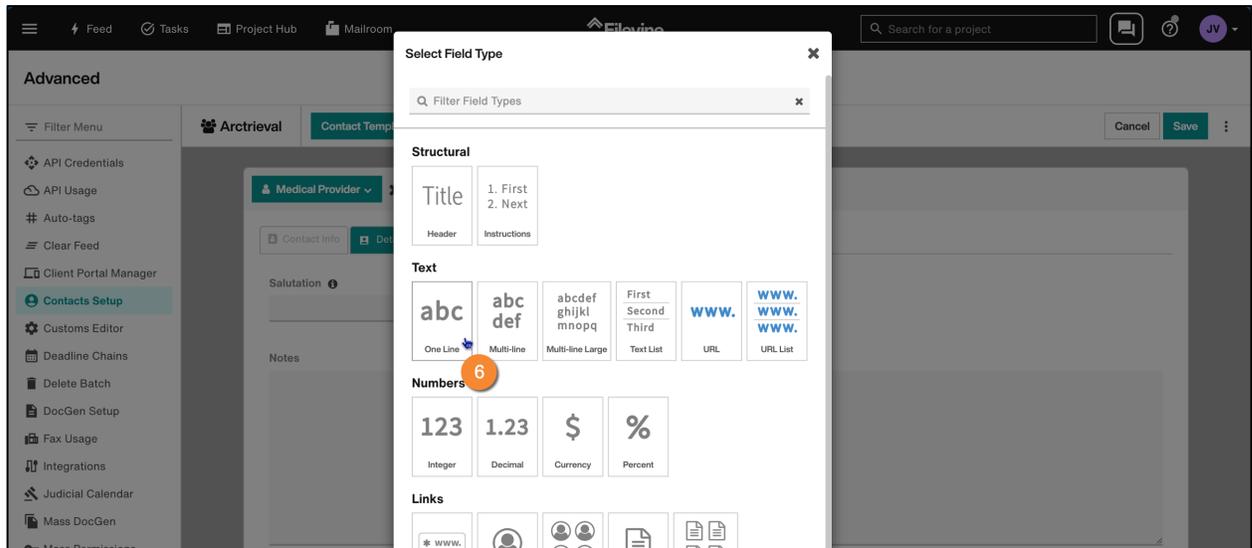


1. Navigate to the Contacts Setup menu.
2. Click on the Preview by Contact Types dropdown list.
3. Check the box next to Medical Provider.

Arctrievl <> Filevine Integration Setup Guide

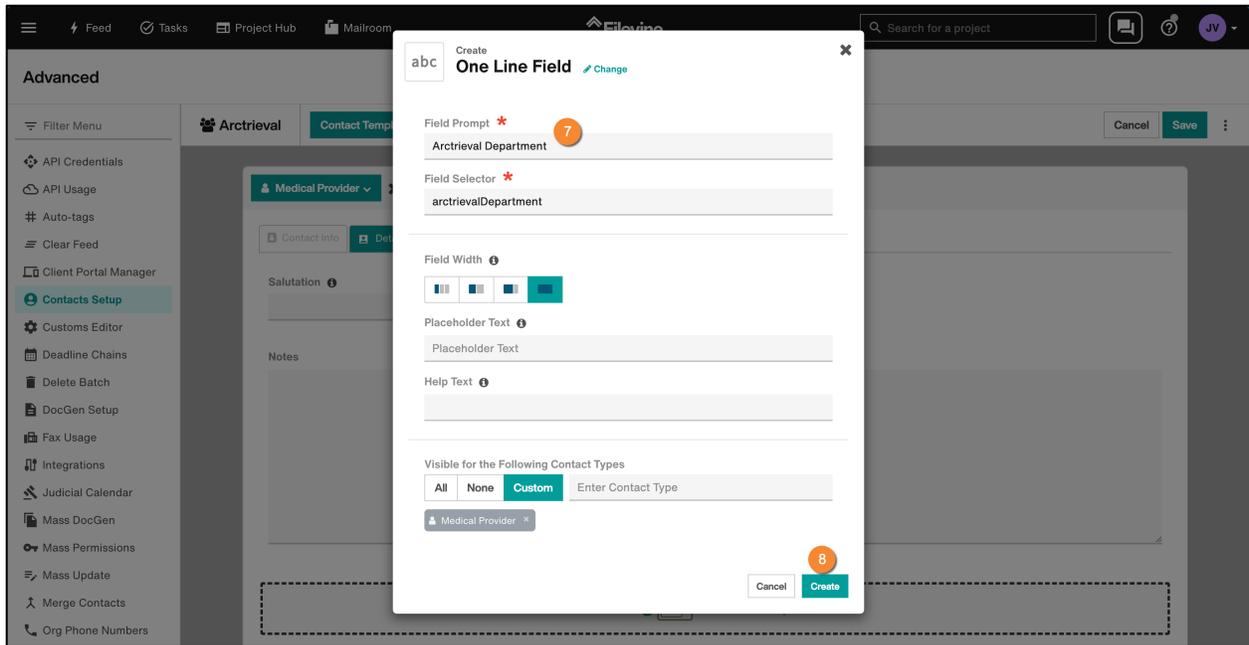


4. Click on the Details tab or another tab where you want to place information specific to Medical Provider Contacts.
5. Click on Add Field

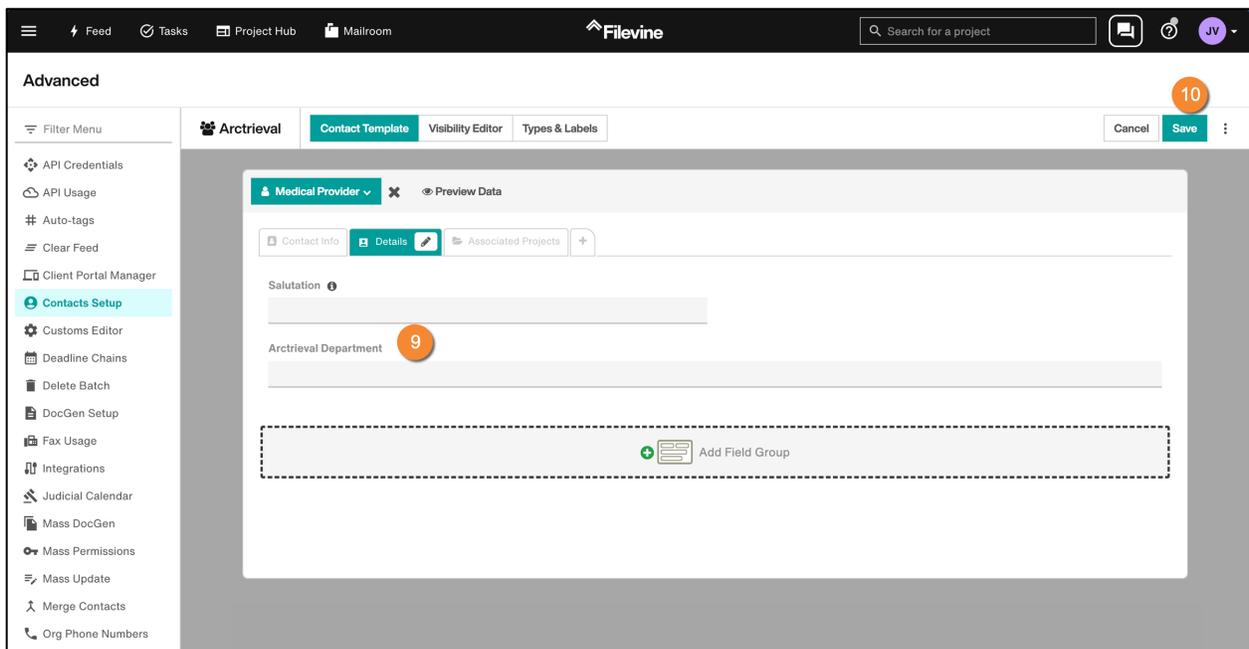


6. Select Text – One Line as the Field Type

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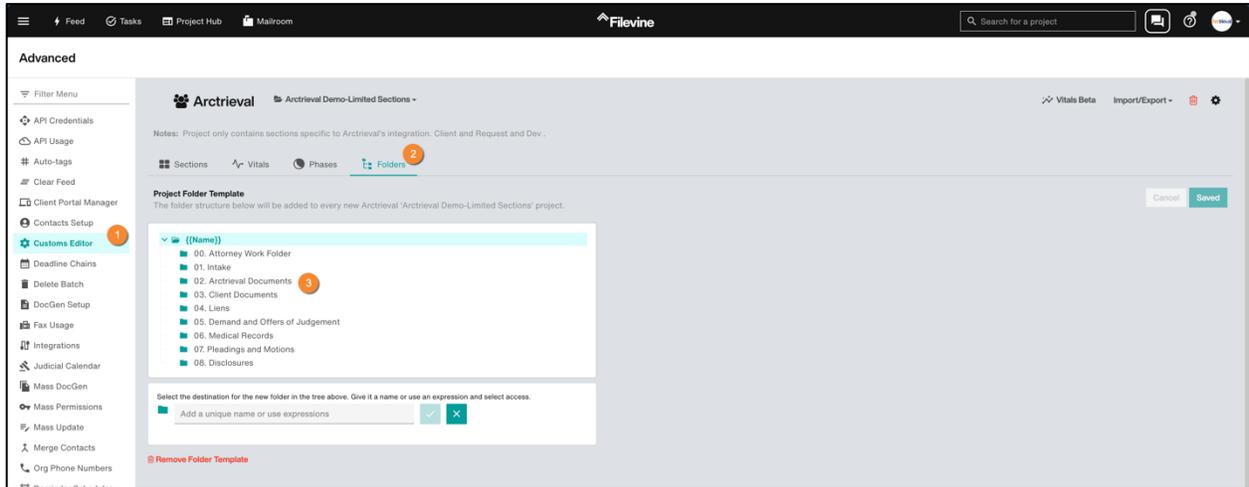
7. Enter Arctrieval Department as the Field Prompt. Filevine will automatically create the Field Selector as arctrievalDepartment. If you change the Field Selector value, you will need to enter the new value into the Arctrieval mapping table.
8. Click the Create Button.



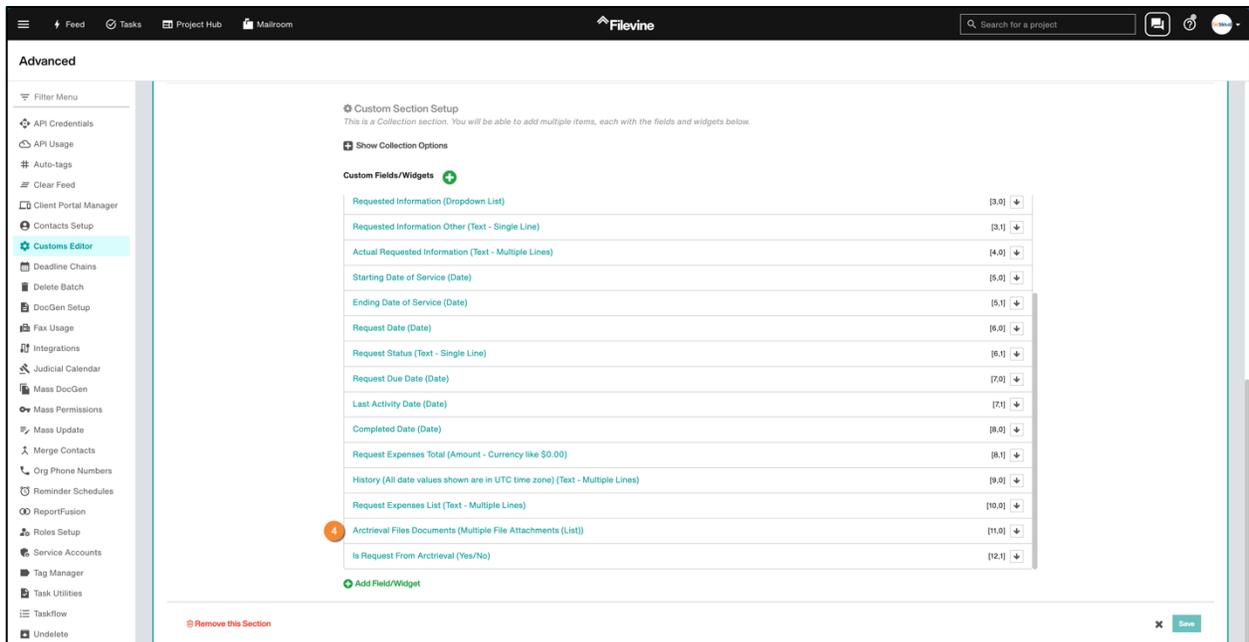
9. The Arctrieval Department field now appears on the Contact form.
10. Press Save to store the changes to your Filevine account.

9. Document Folder Configuration (Optional)

By default, Arctrieval saves all documents from your Arctrieval account into Sub-Folders in the main Documents Folder. Arctrieval will create one sub-folder for each request. If you want Arctrieval to save files in a specific folder automatically, follow the steps below. Begin by navigating to the Advanced menu as shown in the image.

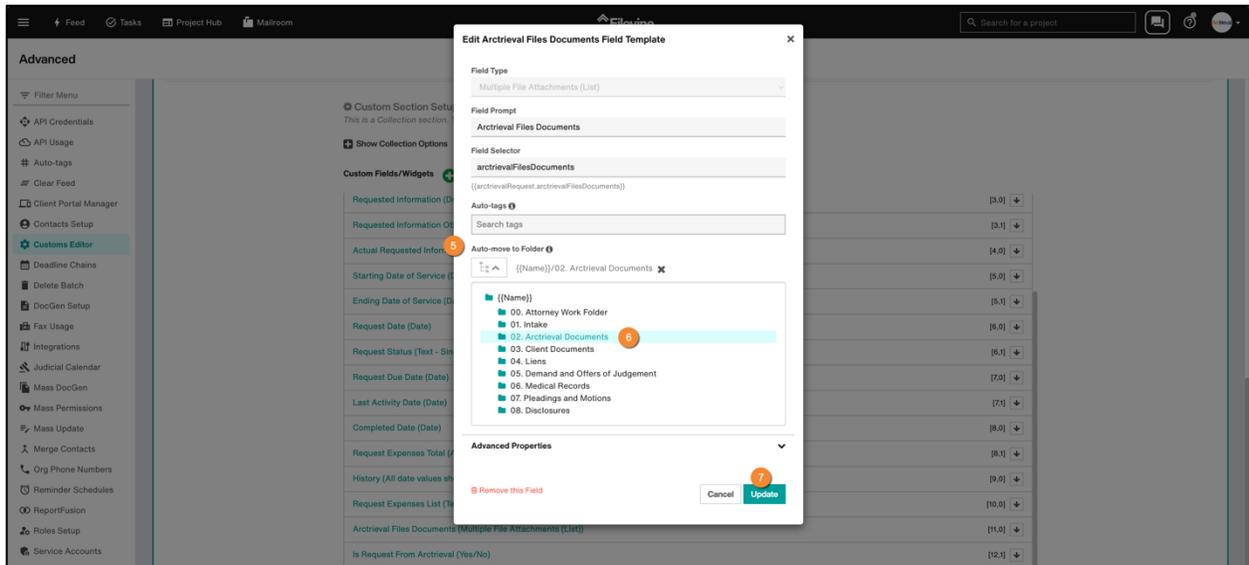


1. Click on the Customs Editor
2. Click on the Folders tab.
3. Create a folder called Arctrieval Documents. This is optional. If you want to store the documents in an existing folder, creating a new folder is unnecessary.

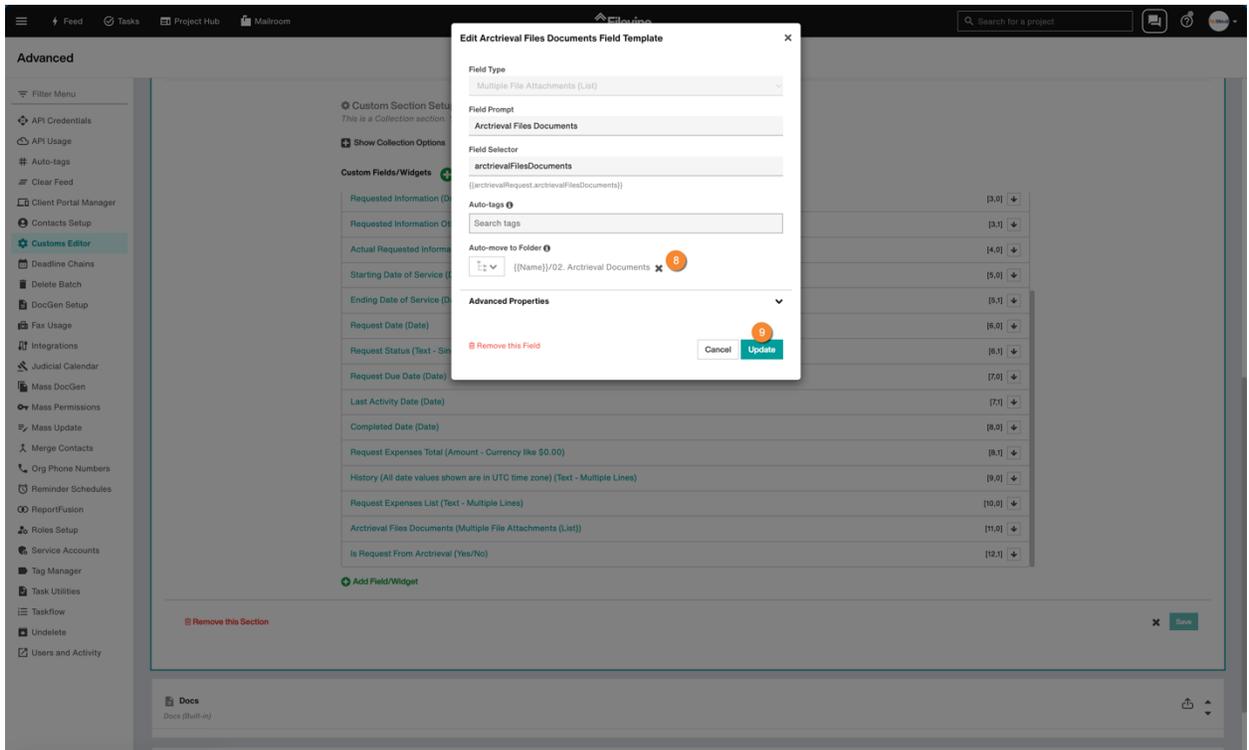


4. Click on the Sections tab in the Customs Editor, navigate to the Arctrieval Request section, expand the Custom Fields/Widgets, and scroll down to the Arctrieval Files Documents (Multiple File Attachments (List)).

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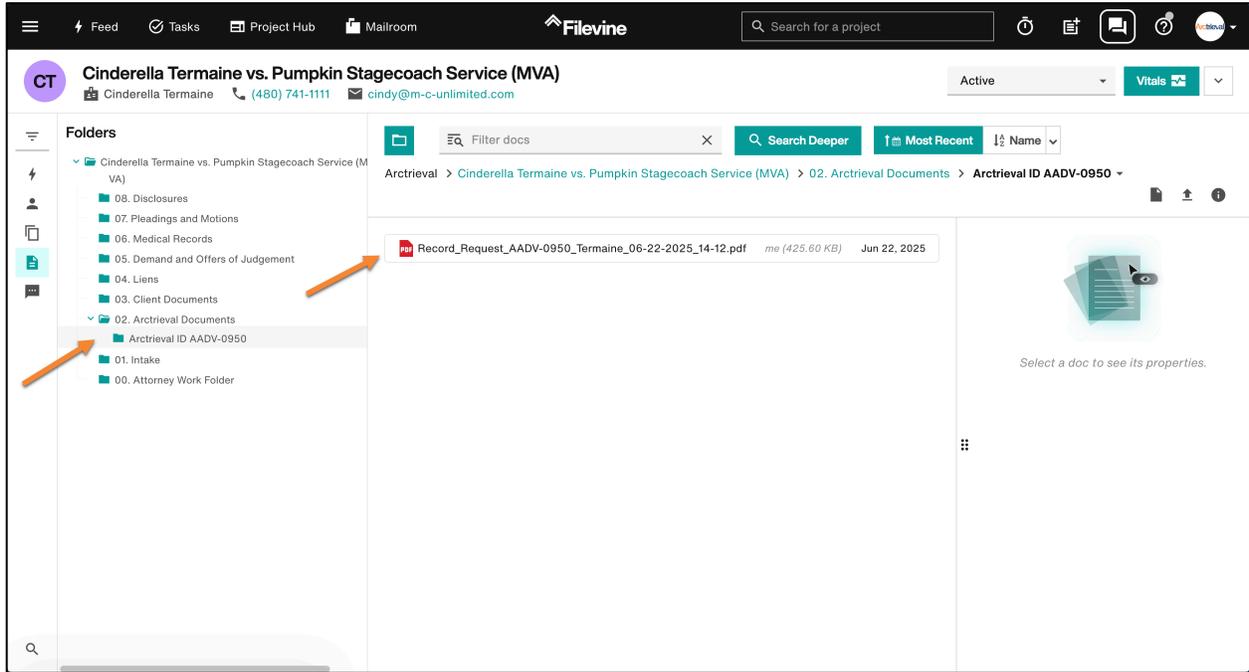
5. Click the down arrow in the Auto-move to Folder dropdown to show the list of available folders.
6. Click on the folder where you want Arctrieval to save the documents sent from Arctrieval to the Filevine project
7. Click on Update to save the changes.



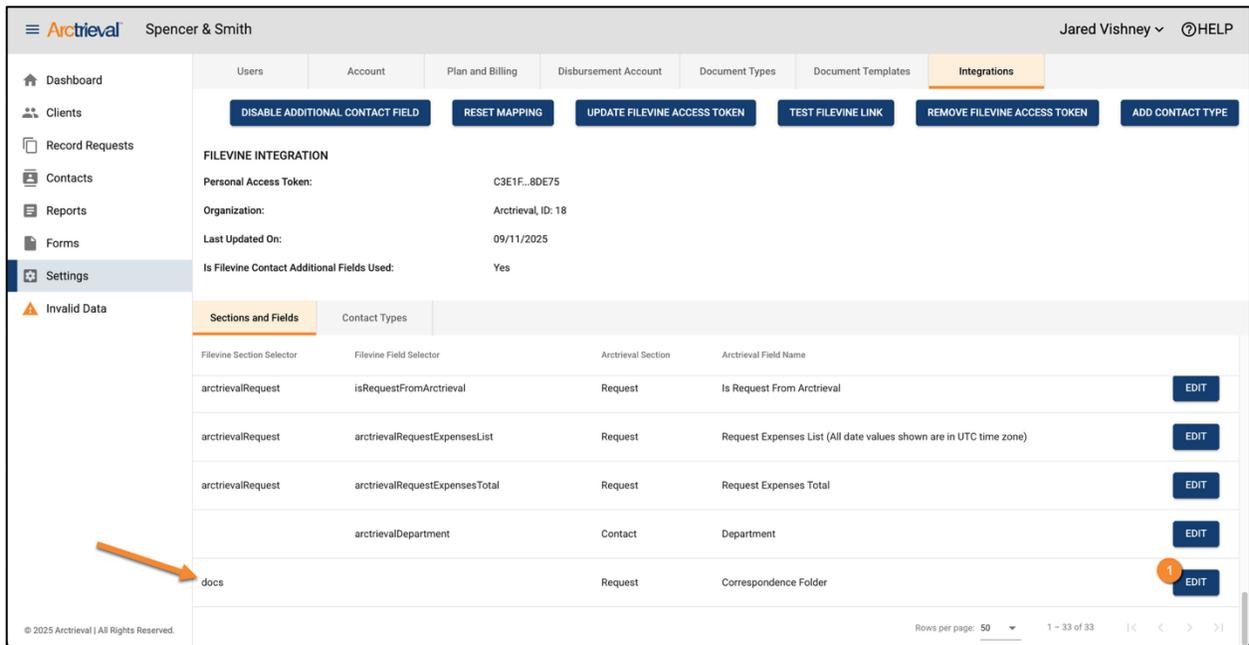
8. The document folder path for the Auto-move to Folder is now displayed.
9. Click on update again to close the dialog box.

9.1. Sub-folders

Arctrievl can automatically create and store all request-related documents in a unique sub-folder in the Docs section, as shown in the image.



If you want Arctrievl to create the sub-folders within the specified Auto-move to Folder, you must enter the Auto-folder information as part of the integration values in Arctrievl. At the end of the list in the Sections and Fields tab on the Integrations pages is the docs value as shown in the image.



1. Click the Edit button to display the Update Filevine Folder Mapping dialog box as shown.

2. Enter the Filevine Folder Name where the documents will be saved.
3. Click the Update button.

Update Filevine Folder Mapping

Filevine Folder Name
02. Arctrieval Documents

Arctrieval Section: Request

Arctrieval Field Name: Documents & Files

Note, upon saving the changes, the system will begin saving Arctrieval documents and files into the configured folder in Filevine. No custom field mapping validation will be triggered.

CANCEL UPDATE

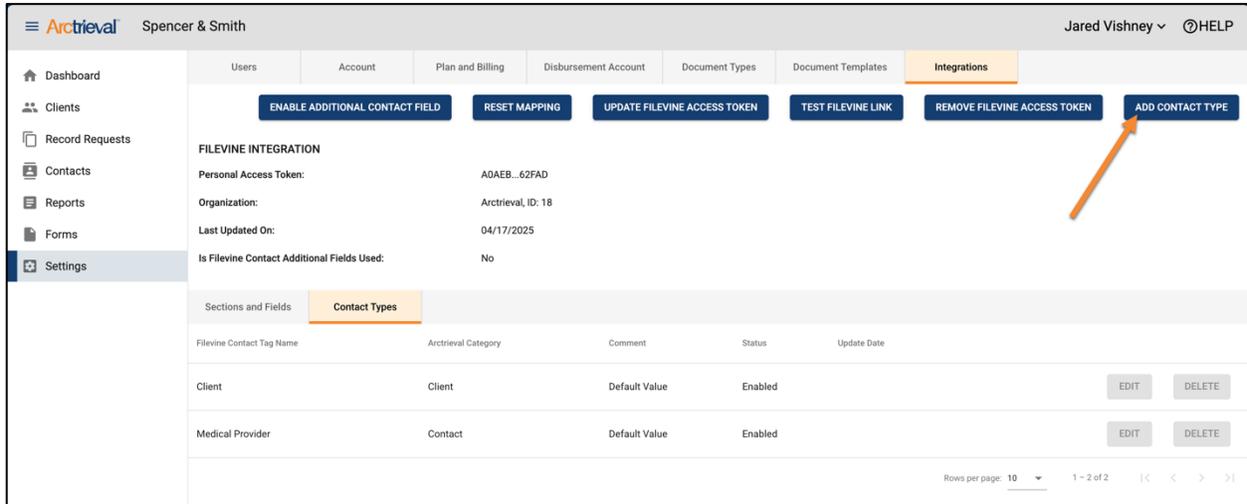
Confirm that the value was correctly saved in the Sections and Fields list docs variable. In this case, “02. Arctrieval documents” was saved as shown in the image.



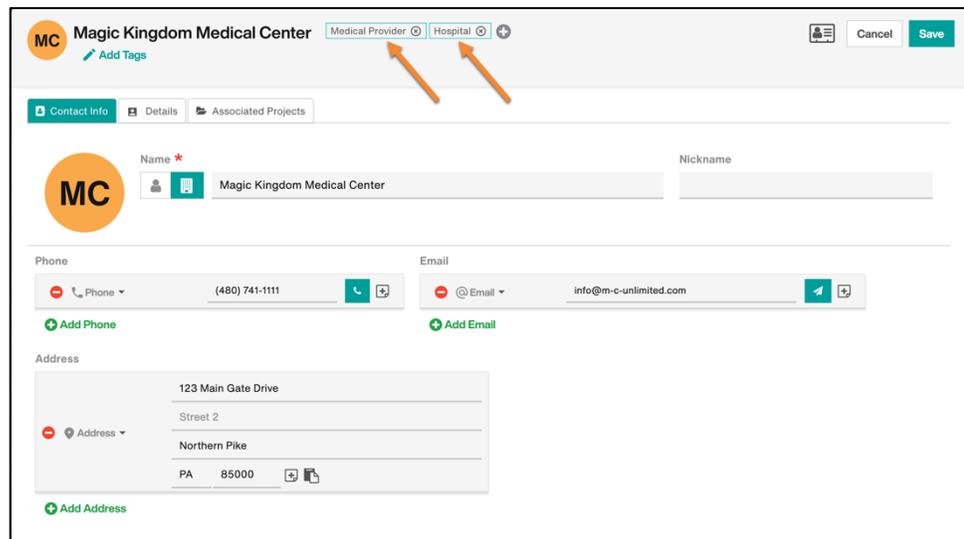
Arctrieval will now create sub-folders to store the information for each request in Filevine.

10. Additional Contact Types Configuration (Optional)

When importing a Client or Contact from Filevine into Arctrieval, Arctrieval relies on the Contact Type to determine if the information should be placed into the Client or Contact table. By default, Arctrieval assumes Clients use the Client Contact Type and Contacts use the Medical Provider Contact Type as shown in the image below. These values are system defaults that cannot be modified or deleted.



Filevine allows for multiple Contact Types to be assigned to a Contact record. Sometimes, other values may indicate that a contact record belongs to a client, such as a “Potential Client,” “PI Client,” or “SSD Client.” Similarly, other values may indicate a Contact record belongs to a medical provider such as “Hospital,” “Doctor,” “Urgent Care,” or “Ambulance.” As shown in the image.



Arctrieval enables you to associate multiple Filevine Contact Types with Clients or Contacts. Clicking the Add Contact Type button shows the following dialog box.

To add a Contact Type:

1. Enter the Filevine Contact Type Name in the space provided.
2. Check the box to indicate which Arctrieval Category the Contact Type belongs to.
3. Enter any Comment related to the Contact Type.
4. Click the Add Contact Type button.

Add New Filevine Contact Type [X]

Filevine Contact Type Name:*
Hospital

Arctrieval Category:*
 Client Contact

Comment:

[CANCEL] [ADD CONTACT TYPE]

A confirmation dialog box is displayed when the action is successful.

Add New Filevine Contact Type [X]

The new type has been successfully added to the mapping.

[CLOSE]

[CANCEL] [ADD CONTACT TYPE]

The new Contact Type is displayed in the Contact Types tab on the Integration page as shown.

Arctrieval Spencer & Smith Jared Vishney [HELP]

Users Account Plan and Billing Disbursement Account Document Types Document Templates **Integrations**

ENABLE ADDITIONAL CONTACT FIELD RESET MAPPING UPDATE FILEVINE ACCESS TOKEN TEST FILEVINE LINK REMOVE FILEVINE ACCESS TOKEN ADD CONTACT TYPE

FILEVINE INTEGRATION

Personal Access Token: A0AEB...62FAD
Organization: Arctrieval, ID: 18
Last Updated On: 04/17/2025
Is Filevine Contact Additional Fields Used: No

Sections and Fields **Contact Types**

Filevine Contact Tag Name	Arctrieval Category	Comment	Status	Update Date		
Client	Client	Default Value	Enabled		EDIT	DELETE
Hospital	Contact	Additional Medical Provider Type	Enabled	04/17/2025	EDIT	DELETE
Medical Provider	Contact	Default Value	Enabled		EDIT	DELETE

Rows per page: 10 1 - 3 of 3 |< > >> |

11. Custom Project Section Configuration

If the default appearance of the sections, the layout of the elements does not match what you want to achieve from the integration, or you want to include the Arctrial variables in an existing section, you will need to add the information to a section and adjust the field mapping.

Each field must satisfy specific requirements, including the correct section type, field type, field properties, and their locations relative to other fields. The section and field requirements used by Arctrial are outlined in the tables below.

If the widgets defined in the `arctrialClient` or `arctrialRequest` tables were added to different sections in Filevine, the Filevine Section Selector and Filevine Field Selector values must be mapped to the appropriate Arctrial data fields.

For example, if the Filevine Project template has an Intake Section with information about the client, that is a good location for the `arctrialClient` data fields. If the Filevine Project template contains a Medical Provider Section, that is a good location for the `arctrialRequest` data fields.

The default values in the `ArctrialClient.fvst` and `ArctrialRequest.fvst` files are displayed on the Integration tab in the Section and Fields tab under the Settings menu.

The screenshot shows the Arctrial Settings page for 'Spencer & Smith'. The 'Integrations' tab is active, displaying 'FILEVINE INTEGRATION' settings. Below this, the 'Sections and Fields' tab is selected, showing a table of field mappings.

Filevine Section Selector	Filevine Field Selector	Arctrial Section	Arctrial Field Name	
<code>arctrialClient</code>	<code>arctrialClientLast4SSN</code>	Client	Last 4 of SSN	EDIT
<code>arctrialClient</code>	<code>arctrialClientAliases</code>	Client	Aliases	EDIT
<code>arctrialClient</code>	<code>arctrialLanguagePreference</code>	Client	Language Preference	EDIT
<code>arctrialClient</code>	<code>arctrialPatientPhotoID</code>	Client	Patient's Photo ID	EDIT
<code>arctrialClient</code>	<code>arctrialIntakeForm</code>	Client	Arctrial Intake Form	EDIT

The following requirements must be met to avoid errors when mapping the fields.

1. All fields in the list must be mapped to the correct fields in Filevine. The fields cannot have a duplicate combination of Section Selector and Field Selector values or there will be errors in the data sent from Filevine to Arctrial.
2. All fields for the Arctrial Request Section must be in the same Filevine project section.
3. All fields for the Arctrial Request Section must be in a Filevine project section that is a collection.
4. All fields for the Arctrial Client Section must be in sections of the Filevine project that are not collections.
5. The Section Selector and Field Selector values must meet the following conditions:
 - a. The specified section exists for the selected project type,
 - b. The specified field exists for the selected section, and
 - c. The field is the correct type and configuration.

11.1. Arctrieval Client Section

To process a request, Arctrieval needs additional information about the Client, which is not part of the default Filevine Contact Information. The required client information is specific to the Filevine Project for the client. There are two options to configure Filevine:

1. Use the pre-built Arctrieval Client section and import it into an existing Project Template in Filevine using the provided ArctrievalClient.fvst file. The process is described earlier in the document.
2. Add the required Custom Fields/Widgets to an existing Section already defined in an existing Project template through the Filevine Customs Editor. Any changes to the Filevine Section Selector or Field Selector values in Filevine must be updated on the Arctrieval Setting -> Integration tab.

The values in the table below show the information in the ArctrievalClient.fvst file. The Section Selector is arctrievalClient {{arctrievalClient.field}}.

Widget Type	Header Text	Widget Selector	Row	Order in Row	Visibility	Visibility Property	Locked	Notes
Sub Section Header	Arctrieval Client Information	arctrievalClientInformation {{arctrievalClient.arctrievalClientInformation}}	X	0	Show	Always	False Unchecked	
Instructions	Data Update Notes	one direction	X + 9	0	Show	Always	False Unchecked	<p>Important Note:</p> <p>==</p> <p>After the Send Request to Arctrieval Task Flow was completed for one request in the project, updating this data will not update the data in Arctrieval.</p> <p>--</p> <p>To update the data in Arctrieval, you must log into Arctrieval and manually update the specific data for the Client in Arctrieval.</p> <p>--</p> <p>Any changes made here after a request is sent to Arctrieval are ignored.</p> <p>--</p>

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Text-Single Line	Arctrieval Client Last 4 of SSN	arctrievalClientLast4SSN {{arctrievalClient. arctrievalClientLast4SSN}}	X + 1	0	Show	Always	False Unchecked	False Unchecked	
Text-Single Line	Arctrieval Client Aliases	arctrievalClientAliases {{arctrievalClient. arctrievalClientAliases}}	X + 1	1	Show	Always	False Unchecked	False Unchecked	
Dropdown List	Arctrieval Language Preference	arctrievalLanguagePreference {{arctrievalClient. arctrievalLanguagePreference}}	X + 1	2	Show	Always	False Unchecked	False Unchecked	Dropdown Items: - English, - Spanish Display As: - Dropdown
Dropdown List	Arctrieval Sex Assigned at Birth	arctrievalSexAssignment {{arctrievalClient.arctrievalSexAssignment}}	X + 1	3	Show	Always	False Unchecked	False Unchecked	Dropdown Items: - Female, Male Display As: - Dropdown
File Attachment	Arctrieval Patient's Photo ID	arctrievalPatientPhotoID {{arctrievalClient. arctrievalPatientSPhotoID}}	X + 2	0	Show	Always	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
File Attachment	Arctrieval Intake Form	arctrievalIntakeForm {{arctrievalClient. arctrievalIntakeForm}}	X + 2	1	Show	Always	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
File Attachment	Arctrieval Additional Client Documentation	arctrievalAdditionalDoc {{arctrievalClient. arctrievalAdditionalDoc}}	X + 2	2	Show	Always	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
Yes/No	Arctrieval Personal Representative	arctrievalPersonalRepresentativeBoolean {{arctrievalClient. arctrievalPersonalRepresentativeBoolean}}	X + 3	0	Show	Always	False Unchecked	False Unchecked	

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Text-Single Line	Arctrieval Personal Representative First Name	arctrievalPerRepFirstName {{arctrievalClient. arctrievalPerRepFirstName}}	X + 4	0	Show	When “Arctrieval Personal Representative” Equals: Yes	True Checked	False Unchecked	
Text-Single Line	Arctrieval Personal Representative Last Name	arctrievalPerRepLastName {{arctrievalClient. arctrievalPerRepLastName}}	X + 4	1	Show	When “Arctrieval Personal Representative” Equals: Yes	True Checked	False Unchecked	
Dropdown List	Arctrieval Personal Representative Relationship	arctrievalPersonalRepRelationship {{arctrievalClient. arctrievalPersonalRepRelationship}}	X + 5	0	Show	When “Arctrieval Personal Representative” Equals: Yes	True Checked	False Unchecked	Dropdown Items: - Parent, - Legal Guardian - Medical Power Of Attorney, - Next Of Kin,- Other Display As: - Dropdown
Text-Single Line	Arctrieval Personal Representative Relationship Other	arctrievalPersonalRepOther {{arctrievalClient. arctrievalPersonalRepOther}}	X + 6	0	Show	When “Arctrieval Personal Representative Relationship” Equals: Other	True Checked	False Unchecked	
File Attachment	Arctrieval Personal Representative’s Photo ID	arctrievalPersonalRepPhotoID {{arctrievalClient. arctrievalPersonalRepPhotoID}}	X + 7	0	Show	When “Arctrieval Personal Representative” Equals: Yes	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
File Attachment	Arctrieval Personal Representative Relationship Documentation	arctrievalPersonalRepRelIDoc {{arctrievalClient. arctrievalPersonalRepRelIDoc}}	X + 7	1	Show	When “Arctrieval Personal Representative” Equals: Yes	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None

Notes:

1. The Arc retrieval widgets and field type can be placed anywhere in the target section, such as at the beginning, middle, or end. As such, the Row value X represents where the Subsection Header is placed. The placement for all other widgets and fields directly relates to the Arc retrieval Sub Section Header placement.
2. The Obsolete option is not displayed in the above table because the value will always be False-Unchecked.

11.2. Arctrieval Request Section

Arctrieval needs information for each Request to process it, such as the Contact, Dates of Service, Information to Request, Type of Request, etc... Request information is needed for each request sent from Filevine to Arctrieval. A Filevine Project can have multiple requests for medical records, billing information, and imaging studies. There are two options to configure Filevine:

1. Use the pre-configured Arctrieval Request section and import it into an existing Project Template in Filevine using the provided ArctrievalRequest.fvst file. The process is described earlier in the document.
2. Add the required Custom Fields/Widgets to an existing Section already defined in an existing Project template through the Filevine Customs Editor. Any changes to the Filevine Section Selector or Field Selector values in Filevine must be updated on the Arctrieval Setting -> Integration tab.

The values in the table below show the information in the ArctrievalRequest.fvst file. The section selector is arctrievalRequest {{arctrievalRequest.field}}.

Widget Type	Header Text/ Widget Prompt	Widget Selector	Row	Order in Row	Visibility	Visibility Property	Locked	Notes
Sub Section Header	Arctrieval Record Request	arctrieval {{arctrievalRequest.arctrievalRecordRequest}}	X	0	Show	Always	False Unchecked	
Action Button	Send Request to Arctrieval	SendArctrievalToRequest {{arctrievalRequest.sendRequestToArctrieval}}	X	1	Show	"Hide" When "Is Request from Arctrieval" Equals "Yes"	False Unchecked	Action Button Type: Taskflow Tigger Button Button Icon: Send  Widget Selector: sendRequestToArctrieval

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Dropdown List	Request Type	arctrievalRequestType {{arctrievalRequest. arctrievalRequestType}}	X + 1	0	Show	Always	False Unchecked	False Unchecked	Dropdown Items: - Patient Directed to 3 rd Party, Patient Directed to Self Display As: - Dropdown
Person	Contact (Medical Provider)	Provider {{arctrievalRequest.Provid er}}	X+1	1	Show	Always	True Checked	False Unchecked	Limit to Contact Type: Medical Provider
Text – Single Line	Arctrieval ID	arctrievalID {{arctrievalRequest. arctrievalID}}	X + 1	2	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval—No Filevine user enter.
Dropdown List	Requested Information	arctrievalRequestedInfor mation {{arctrievalRequest. arctrievalRequestedInfor mation}}	X + 2	0	Show	Always	False Unchecked	False Unchecked	Dropdown Items: - All Billing Records, All Medical Records, All Imaging Studies, Other Display As: - Dropdown
Text – Single Line	Requested Information Other	arctrievalRequestedInfor mationOther {{arctrievalRequest. arctrievalRequestedInfor mationOther}}	X + 2	1	Show	When “Arctrieval Requested Information” Equals: Other	True Checked	False Unchecked	
(Text – Single Line) or (Text – Multiple Lines)	Actual Requested Information	arctrievalActualRequested Information {{arctrievalRequest. arctrievalActualRequested Information}}	X + 3	0	Show	Always	False Checked	True Checked	Values will come from Arctrieval.
Text – Multiple Lines	Additional Cover Letter Information (600 Characters Max)	arctrievalCoverLetterInfor m {{arctrievalRequest.arctrie valCoverLetterInform}}	X+3	1	Show	Always	False Unchecked	False Unchecked	

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Date	Starting Date of Service	arctrieverStartingDateOfService {{arctrieverRequest.arctrieverStartingDateOfService}}	X + 4	0	Show	Always	False Unchecked	False Unchecked	After the value is finalized in Arctriever and a request is submitted, Arctriever will overwrite any user edits in Filevine.
Date	Ending Date of Service	arctrieverEndingDateOfService {{arctrieverRequest.arctrieverEndingDateOfService}}	X + 4	1	Show	Always	False Unchecked	False Unchecked	Value comes from Arctriever after the request is sent; Arctriever will overwrite any user edits in Filevine.
Date	Request Date	arctrieverRequestDate {{arctrieverRequest.arctrieverRequestDate}}	X + 5	0	Show	Always	False Unchecked	True Checked	Value comes from Arctriever after the request is sent.
Text – Single Line	Request Status	arctrieverRequestStatus {{arctrieverRequest.arctrieverRequestStatus}}	X + 5	1	Show	Always	False Unchecked	True Checked	Value comes from Arctriever after the request is sent.
Date	Request Due Date	arctrieverRequestDueDate {{arctrieverRequest.arctrieverRequestDueDate}}	X + 6	0	Show	Always	False Unchecked	True Checked	Value comes from Arctriever after the request is sent.
Date	Last Activity Date	arctrieverLastActivityDate {{arctrieverRequest.arctrieverLastActivityDate}}	X + 6	1	Show	Always	False Unchecked	True Checked	Value comes from Arctriever after the request is sent.
Date	Completed Date	arctrieverCompletedDate {{arctrieverRequest.arctrieverCompletedDate}}	X + 7	0	Show	Always	False Unchecked	True Checked	Value comes from Arctriever after the request is sent.
Amount – Currency like \$0.00	Request Expenses Total	arctrieverRequestExpenseTotal {{arctrieverRequest.arctrieverRequestExpenseTotal}}	X+7	1	Show	Always	False Unchecked	True Checked	Value comes from Arctriever after the request is sent and expense values exist.

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Text – Multiple Lines or (Text – Multiple Lines(Large)	History (All date values shown are in UTC time zone)	arctrievalHistory {{arctrievalRequest. arctrievalHistory}}	X + 8	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Text – Multiple Lines or (Text – Multiple Lines(Large)	Request Expenses List	arctrievalRequestExpense sList {{arctrievalRequest.arctrie valRequestExpensesList}}	X + 9	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Multiple File Attachments (List)	Arctrieval Files Documents	arctrievalFilesDocuments {{arctrievalRequest. arctrievalFilesDocuments} }	X + 10	0	Show	Always	False Unchecked	True Checked	Files come from Arctrieval. Auto-tags - None Auto-move to Folder - None
Yes/No	Is Request From Arctrieval	isRequestFromArctrieval {{arctrievalRequest.isRequ estFromArctrieval}}	X + 11	1	Show	When “Arctrieval ID” Equals AAAA-0000	False Unchecked	True Checked	

Notes:

1. No additional settings for the Taskflow Action button are needed within Filevine because the trigger is a standard event. The only condition to work is that the Widget Selector Value matches what is specified in the Arctrieval <> Filevine mapping. When the Taskflow button is pressed, Filevine triggers certain actions, and Arctrieval users the webhook trigger event. Arctrieval receives an API request that contains information about which button in which project for which company was pressed and processes information by creating a Record Request.

The mechanism is configured when the Filevine integration information is entered, and the subscription is created. No other actions are required on the part of the user.

11.3. Edit Field Mapping

Click on the Edit button to display the Update Filevine Section and Field Selector Mapping dialog box, as shown in the image.

Enter the new values for the Filevine Section Selector or Filevine Field Selector, and press the Update button. The Filevine Section Selector value was changed from arctrievalClient to Intake in the example.

Pressing the Update button displays the Verify Field Mapping dialog box, as shown in the image.

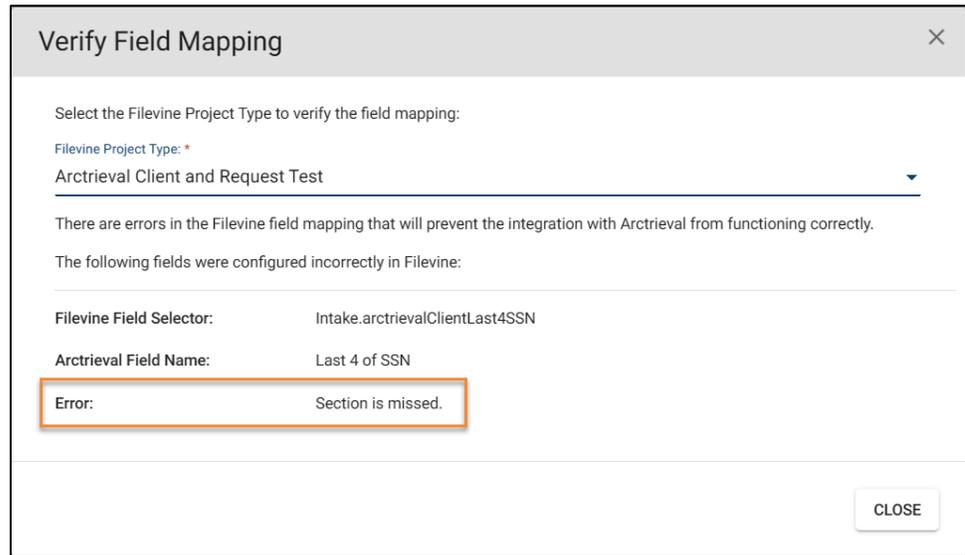
If you update multiple values, you can verify each update as you go or wait until all the changes are made and verify the mapping for all Section Selectors and Field Selectors.

Clicking the Verify Mapping button displays the dialog box shown in the image.

Select the Filevine Project Type to use to verify the field mapping. Arctrieval can be configured to work with multiple Filevine Project Types. Once the Project type is selected, Arctrieval immediately attempts to verify the field mapping.

11.4. Field Mapping Errors

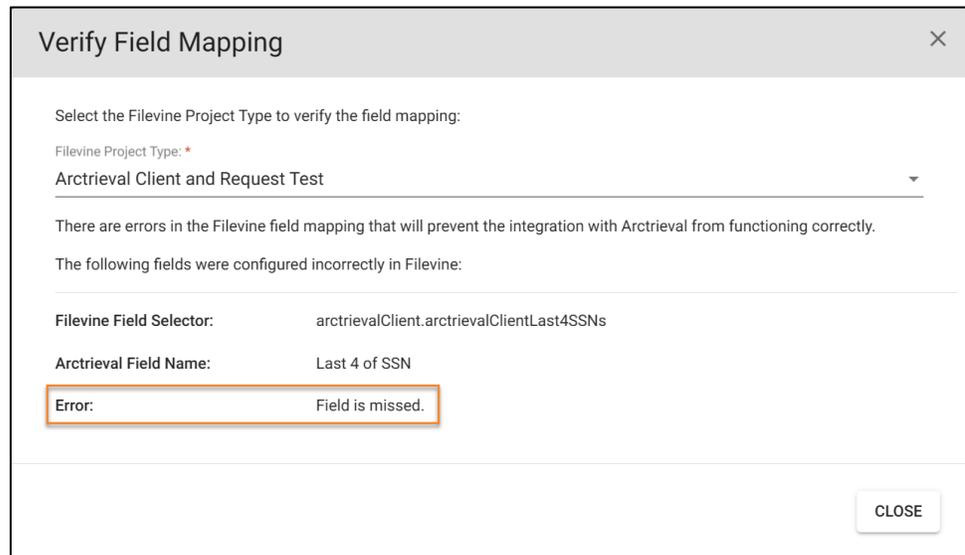
If there is an issue or error with the Section Selector mapping, the system displays the dialog box in the image.



Arctrieval determined that the Section on the Filevine Project does not exist. The Filevine Section Selector value entered into Arctrieval does not match the value for any sections in the project. Correct the value in Arctrieval or edit the value in Filevine to match the value in Arctrieval.

If there is an issue or error with the Field Selector mapping, the system displays the dialog box in the image.

Arctrieval determined that the Field in the Section on the Filevine Project does not exist. The Filevine Field Selector value entered into Arctrieval does not match the field value in the specified sections in the project. Correct the value in Arctrieval or edit the value in Filevine to match the value in Arctrieval.



The values for field mapping errors are highlighted in red in the mapping table, as shown in the image.

Filevine Section Selector	Filevine Field Selector	Arctrievial Section	Arctrievial Field Name	
Intake	arctrievialClientLast4SSN	Client	Last 4 of SSN	EDIT
arctrievialClient	arctrievialClientAliases	Client	Aliases	EDIT
arctrievialClient	arctrievialLanguagePreference	Client	Language Preference	EDIT
arctrievialClient	arctrievialPatientPhotoID	Client	Patient's Photo ID	EDIT
arctrievialClient	arctrievialIntakeForm	Client	Arctrievial Intake Form	EDIT

Once the error in the field mapping is fixed, reload the page, and the fields will appear in black. The red highlighting only occurs when a field has an error.

11.5. Field Mapping Verified

If all the field mappings are verified, the values in the mapping table will all be displayed in black. Any errors are highlighted in red.

Verify Field Mapping

Select the Filevine Project Type to verify the field mapping:

Filevine Project Type:*
Arctrievial Demo-Limited Sections

The mapping is set up correctly, you can start using the integration with the current settings.

CLOSE

12. Arctrieval Role-Based Permissions for Filevine

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

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

✕
Edit User Account Information

First Name: *
James

Last Name: *
Lindey

Title:
Paralegal

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

Username: *
jlindey

User Level: *
User

Alternate Address	User Settings	Signature
Allowed To Update Own Profile? <input type="checkbox"/>	Allowed To Unlink Filevine Request? <input checked="" type="checkbox"/>	Allowed To Merge Contacts And Requests? <input type="checkbox"/>
Allowed To Change Password? <input type="checkbox"/>	Allowed To Delete Information? <input type="checkbox"/>	Allowed To Disable Contact Follow-Up? <input type="checkbox"/>
Allowed To Add Contacts? <input type="checkbox"/>	Allowed To Merge Clients And Requests? <input type="checkbox"/>	Allowed To Unlink Filevine Client? <input checked="" type="checkbox"/>
Allowed To Merge Clients And Requests? <input type="checkbox"/>	Request Status Notifications: Enabled	Allowed To Unlink Filevine Contact? <input checked="" type="checkbox"/>
		Allowed To Complete Other User's Activity? <input type="checkbox"/>

CANCEL
SAVE CHANGES



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

13. Configuration Notes

13.1. Project Contact Data Mapping to Arctrieval

The data mapping between Filevine and Arctrieval assumes that the Project Contact is the injured individual and is mapped to the Client section in Arctrieval. The Project Contact can be an adult who is the firm's direct client or a minor child whose parents have engaged the firm to assist with the minor child's claim or case.

If the injured individual is not the Project Contact, you must configure the integration differently. For example, the Project Contact is the parent of a minor injured child. In this situation, the Project Contact is the minor child's personal representative when requesting protected health information. Please contact Arctrieval support if this is the case for you.

13.2. Company Field--Single Filevine Instance connected to multiple Arctrieval accounts

If a Filevine tries to send a request to an Arctrieval account that does not exist, the following happens in Filevine:

1. Arctrieval ID is set to Error
2. Request Status is set to No Arctrieval Account Exists