



Arctrieval Legal
Arctrieval <> SmartAdvocate Integration Setup Guide

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1. Introduction

Arctrieval is a software-based solution that streamlines the process of obtaining and managing medical records, billing information, and imaging studies for legal professionals. SmartAdvocate is a case management platform used by law firms to manage cases from intake through resolution.

The Arctrieval and SmartAdvocate integration extends the functionality of SmartAdvocate by enabling firms to manage the medical record retrieval process within Arctrieval while maintaining alignment with case data in SmartAdvocate. In this structure, SmartAdvocate remains the system of record for case management, while Arctrieval serves as the system of action for record retrieval and workflow management.

The integration supports multiple workflows to provide flexibility based on how a firm operates:

- Record requests can be created in SmartAdvocate and transferred to Arctrieval either automatically (every two hours) or manually on demand.
- Record requests can be initiated directly within Arctrieval and linked to the appropriate case in SmartAdvocate.
- Clients and medical providers (contacts) can be imported from SmartAdvocate into Arctrieval or linked between the two systems to maintain consistency.
- Record requests managed in Arctrieval can be linked to SmartAdvocate cases, with key updates synchronized to SmartAdvocate.

This flexibility allows firms to continue working within SmartAdvocate while leveraging Arctrieval to manage the complexities of medical record retrieval, follow-up, and document handling.

This guide is intended to assist SmartAdvocate and Arctrieval administrators in configuring the integration between the two systems. It outlines the required settings, mappings, and configuration steps necessary to ensure that data is exchanged accurately and that the integration functions as intended.

2. Integration Functionality Overview

The Arctrieval and SmartAdvocate integration supports bi-directional data exchange and linking across clients, medical providers, and record requests. The functionality is structured to allow administrators to configure and maintain alignment between both systems while supporting multiple workflow paths.

2.1. Clients

1. Import Client from SmartAdvocate
 - a. Clients can be searched and imported from SmartAdvocate into Arctrieval.
 - b. Import is based on SmartAdvocate contact records designated as Client.
2. Link Client to SmartAdvocate
 - a. Existing Arctrieval clients can be linked to corresponding SmartAdvocate clients.
 - b. Linking establishes a persistent relationship for synchronization.
3. Unlink Client
 - a. Linked clients can be unlinked when necessary (permission-based).

2.2. Medical Providers (Contacts)

1. Import Medical Provider from SmartAdvocate
 - a. Medical providers can be searched and imported from SmartAdvocate into Arctrieval.
 - b. Includes organizations (e.g., hospitals, medical offices) and individual providers (e.g., doctors).
2. Link Medical Provider to SmartAdvocate
 - a. Existing Arctrieval contacts can be linked to SmartAdvocate medical provider records.
 - b. Linking ensures consistency across both systems.
3. Unlink Medical Provider
 - a. Linked medical providers can be unlinked when necessary (permission-based).

2.3. Record Requests

1. Create Request from SmartAdvocate
 - a. Record requests created in SmartAdvocate can be transferred to Arctrieval:
 - b. Automatically (every two hours), or
 - c. Manually on demand.
2. Create Request in Arctrieval
 - a. Record requests can be initiated directly within Arctrieval and linked to a SmartAdvocate case.
3. Link Request to SmartAdvocate
 - a. Existing Arctrieval requests can be linked to SmartAdvocate cases.
 - b. Linking creates or associates a corresponding SmartAdvocate medical request.
4. Update and Synchronization
 - a. Updates made to linked requests in Arctrieval are synchronized to SmartAdvocate.
 - b. Synchronization includes request type and requested information fields
5. Unlink Request
 - a. Linked requests can be unlinked when necessary (permission-based), removing the association between systems.
 - b. When a request is unlinked, Arctrieval removes the request information from SmartAdvocate.

2.4. Notes on Functionality

- Client and medical provider matching is based on SmartAdvocate contact types and mapping configuration.
- Request linking behavior varies based on whether the request is newly created or linked to an existing case.
- Certain SmartAdvocate configuration elements (e.g., contact types, record types) must be set up correctly for functionality to operate as intended.

3. Document Change History

Date	Document Revision	Description of Changes
11/15/2023	1.0	Initial Document.
4/23/2024	1.1	Updated images when removing the key, added information about URL to use and provided tips on SmartAdvocate User Name convention.
7/30/2044	1.2	Add Arctrieval – Invoice Disputed to Medical Provider Records Request Picklist
8/16/2024	1.3	Clarified System Parameter settings. Added Invoice Disputed.
12/3/2024	1.4	Note about API Access for the Admin User
7/21/2025	1.5	Corrected configuration error related to Arctrieval – Invoice Disputed.
8/2/2025	1.6	Photo ID document subcategory values changed to _Patient Photo ID and _Representative Photo ID
1/15/2026	1.7	Removed three unused values from Medical Provider Records Request Status picklist. Added information about Case Notes configuration.
3/10/2026	1.8	Added Picklist information for synchronizing Case Notes
4/13/2026	1.9	Updated integration to support bi-directional workflows, including client and provider import/linking, request creation in Arctrieval, and synchronization with SmartAdvocate cases.

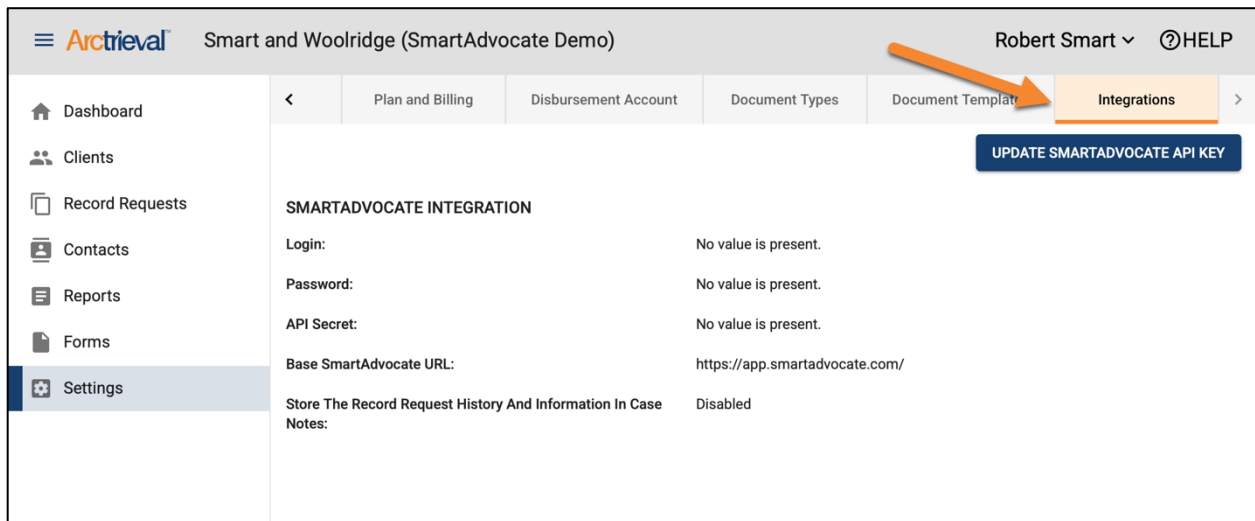
4. Arctrieval Configuration

To enable SmartAdvocate and Arctrieval to communicate and exchange data, the following configuration steps must be completed:

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

4.1. Establishing the Link Between SmartAdvocate and Arctrieval

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



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

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

Update SmartAdvocate Integration Information

SmartAdvocate Login: *
Enter SmartAdvocate Login
This field is required!

SmartAdvocate Password: *

SmartAdvocate Client Key: *

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

Base URL: *

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

Default base URL is:
https://app.smartadvocate.com/.

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

Usually it is something like this:
https://arctrieval.smartadvocate.com/.

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

CANCEL SAVE CHANGES



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

Enter the SmartAdvocate credentials as follows:

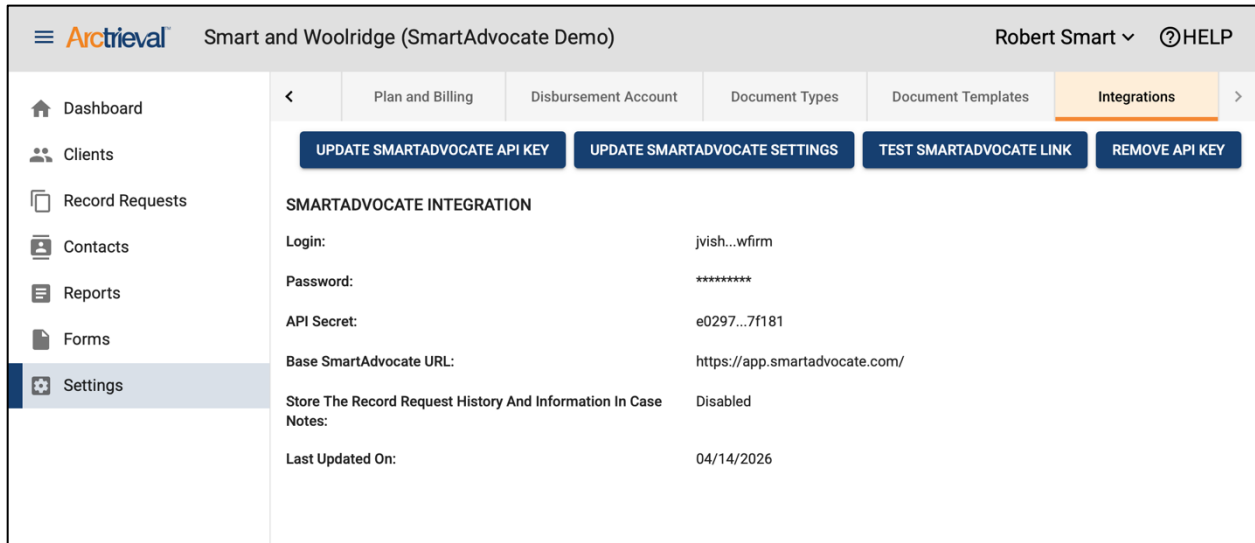
1. SmartAdvocate Login is the User Name of a SmartAdvocate administrator in your firm.
2. The SmartAdvocate Password is the password of the SmartAdvocate administrator in your firm, as shown in item 1.
3. SmartAdvocate Client Key is provided to you by SmartAdvocate.
4. SmartAdvocate provides the base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



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

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

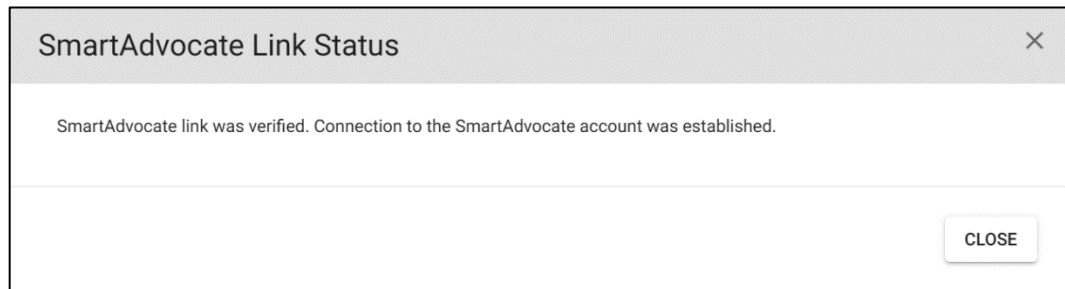
The web page shown in the image is displayed after entering the correct User Name, Password, Client Key, and Base URL for your SmartAdvocate account and clicking the Save Changes button.



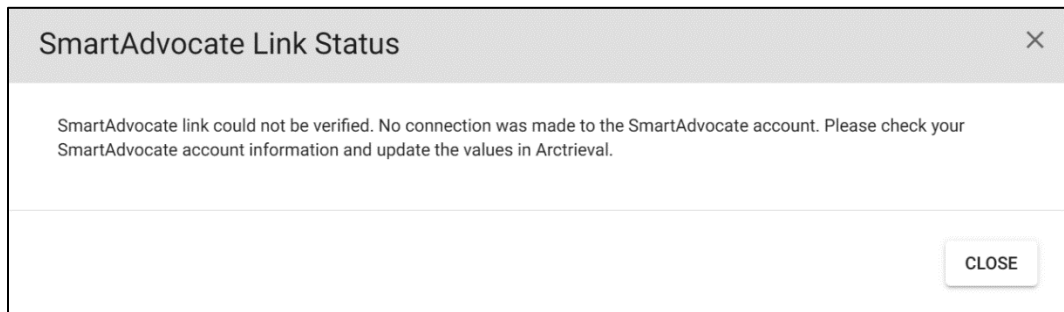
You can verify that the information is correct by clicking the Test SmartAdvocate Link button.

4.2. Test SmartAdvocate Link

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



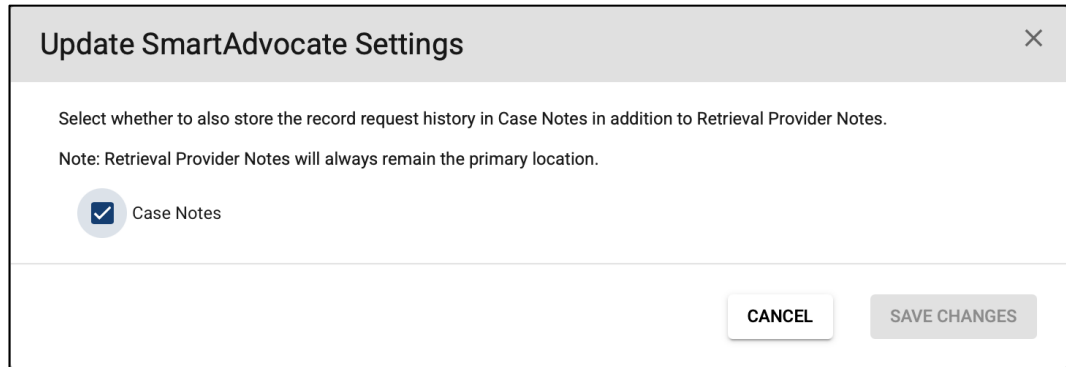
If the test fails, as shown in the image, please start troubleshooting the issue by updating the User Name, Password, Client Key, and SmartAdvocate Base URL.



4.3. Update SmartAdvocate Settings

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

When the option is enabled, Arctrievall creates and maintains one note per request. When the note is updated in SmartAdvocate, Arctrievall will replace all the information in the note with the new information.

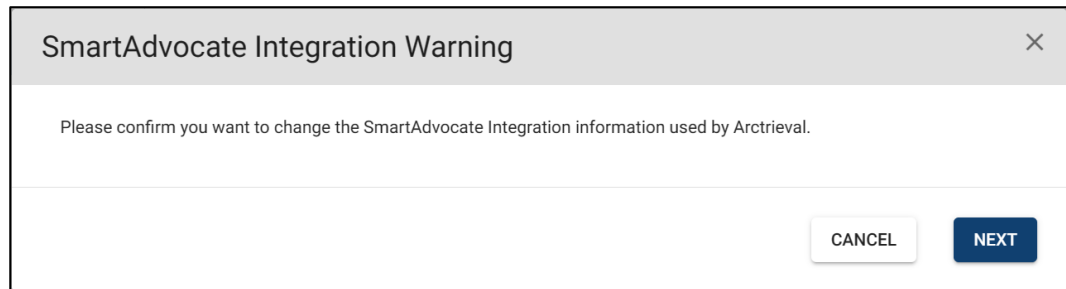


Any changes made directly to the case note in SmartAdvocate will be overwritten.

4.4. Update SmartAdvocate API Key

If a valid connection between SmartAdvocate and Arctrievall exists, clicking the Update SmartAdvocate API Key button displays the dialog box in the image.

Clicking the Next button displays the Update

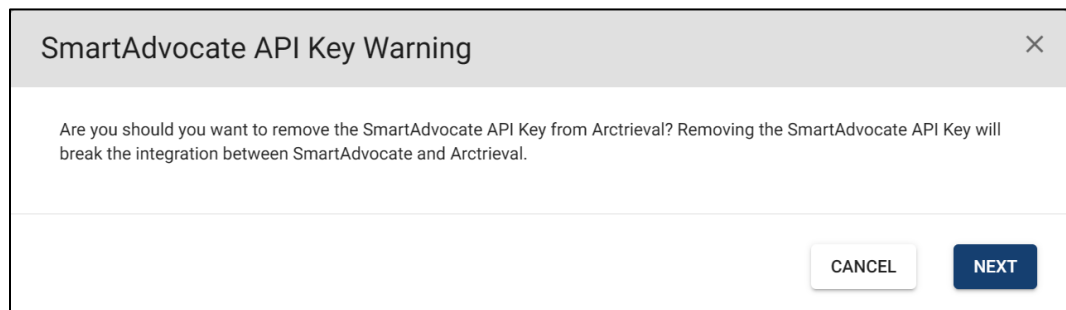


SmartAdvocate API Key dialog box. This functionality should only be used if the original values were incorrect or if the SmartAdvocate account is migrating to a new instance.

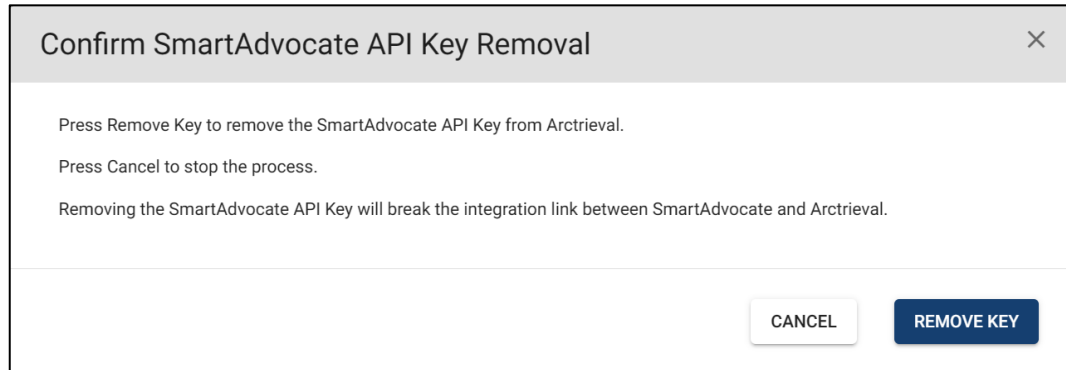
Updating the SmartAdvocate API Key requires that all values are re-entered. It is not possible to update only one value.

4.5. Remove SmartAdvocate API Key

Clicking the Remove SmartAdvocate API Key button displays the SmartAdvocate API Key Warning dialog box, as shown in the image.



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



Click the Remove Key button to remove the integration link between SmartAdvocate and Arctrieval.

5. SmartAdvocate Configuration

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

5.1. Document Categories - Picklist Maintenance

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

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

5.2. Document Sub-Categories – Picklist Maintenance

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

add each document type to the Arctrieval Category.

The following Document Sub-Categories values must be added:

Item	Sub-Category Value	Category Value
1.	_Additional Client Documentation	Arctrieval
2.	_Intake Form	Arctrieval
3.	_Patient Photo ID	Arctrieval
4.	_Relationship Documentation	Arctrieval
5.	_Representative Photo ID	Arctrieval
6.	Balance Verification	Arctrieval
7.	Billing Records	Arctrieval
8.	Certificate of No Records	Arctrieval

Item	Sub-Category Value	Category Value
9.	Correspondence Letter	Arctrieval
10.	Custodian of Record Affidavit	Arctrieval
11.	Imaging Studies	Arctrieval
12.	Invoice	Arctrieval
13.	Medical Records	Arctrieval
14.	Other	Arctrieval
15.	Rejection Notice or Letter	Arctrieval
16.	Request	Arctrieval

When completed, the Document Sub-Category Picklist will have 16 entries, and Arctrieval must be used to filter the Category, as shown in the image.

ADD NEW ITEM
Picklist Maintenance
Export

Sub-Category	Category	Associated Time (in minutes)	Activity Code	Time Tracking	Action
<input type="text"/>	arctrieval	<input type="text"/>	<input type="text"/>	<input type="text"/>	
_Additional Client Documentation	Arctrieval				
_Intake Form	Arctrieval				
_Patient Photo ID	Arctrieval				
_Relationship Documentation	Arctrieval				
_Representative Photo ID	Arctrieval				
Balance Verification	Arctrieval				
Billing Records	Arctrieval				
Certificate of No Records	Arctrieval				
Correspondence Letter	Arctrieval				
Custodian of Record Affidavit	Arctrieval				
Imaging Studies	Arctrieval				
Invoice	Arctrieval				
Medical Records	Arctrieval				
Other	Arctrieval				
Rejection Notice or Letter	Arctrieval				
Request	Arctrieval				
<input type="text"/>	<input type="text"/>				<input type="text"/>

Page 1 of 1 (17 items) < 1 >

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

5.3. Medical Provider Records Request Status – Picklist Maintenance

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

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

The image shows a dialog box titled "Edit Form" with a close button (X) in the top right corner. It contains two input fields: "Status:" with the text "Arctrieval - Canceled" and "Description:" which is currently empty. At the bottom right of the dialog, there are two blue buttons labeled "UPDATE" and "CANCEL".

The following Medical Provider Records Request Status values must be added:

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

When completed, the Medical Provider Records Request Status Picklist must have 16 entries, and Arctrieval must be used to filter the Category, as shown in the image.

ADD NEW ITEM		Picklist Maintenance		Export
Status	Description			Action
Arctrieval				
Arctrieval - Canceled				
Arctrieval - Completed				
Arctrieval - Completed-No Records				
Arctrieval - Deleted				
Arctrieval - Delivery Issue				
Arctrieval - Incomplete				
Arctrieval - Invalid Data				
Arctrieval - Invoice Disputed				
Arctrieval - Invoice Paid				
Arctrieval - Invoice Received				
Arctrieval - Open				
Arctrieval - Past Due				
Arctrieval - Pickup				
Arctrieval - Progress				
Arctrieval - Rejected				
Arctrieval - Saved as Draft				

Page 1 of 1 (16 items) < 1 >



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

5.4. Medical Record Request Types

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

Edit Form ✕

Record Type:*

Case Types:

Case Groups:

Template:

The following Medical Record Request Type values must be added:

Item	Record Type
1.	Arctrieval Patient to 3rd Party Billing Record
2.	Arctrieval Patient to 3rd Party Imaging Study
3.	Arctrieval Patient to 3rd Party Medical Record
4.	Arctrieval Patient to Self Billing Record
5.	Arctrieval Patient to Self Imaging Study
6.	Arctrieval Patient to Self Medical Record
7.	Arctrieval To 3rd Party Compound Request
8.	Arctrieval To Self Compound Request

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

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



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

5.5. Contact Types Mapping

Arctrieval uses SmartAdvocate Contact Types to determine how records are classified and handled during import, linking, and synchronization. Contact Types in SmartAdvocate are mapped to either Clients or Contacts (Medical Providers) within Arctrieval.

Accurate configuration of Contact Types is required to ensure that clients and medical providers are identified correctly and that requests and documents are associated with the appropriate records.

5.5.1. Client Contact Type Mapping

1. Mapping Logic

Arctrieval identifies a client in SmartAdvocate using the following criteria:

- a. The record must be an Individual Contact
- b. The contact must have a Contact Type = Client

Only contacts that meet both conditions are treated as Clients within Arctrieval.

2. Importing Clients

- a. Arctrieval searches for and imports a client based on the mapping criteria above

3. Linking Clients

- a. An existing client in Arctrieval can be linked to an existing contact with the mapping criteria in SmartAdvocate

4. Unlinking Clients

- a. A linked client in Arctrieval can be unlinked from a linked Contact in SmartAdvocate
- b. Unlinking removes the association but does not delete any data in Arctrieval or SmartAdvocate

ADD NEW ITEM		Picklist Maintenance		Export
Contact Type	Contact Category	Action		
client				
Client	Individual	✎ ✕		

Page 1 of 1 (1 items) < 1 >

5.5.2. Medical Provider Contact Type Mapping

1. Mapping Logic

Arctrieval identifies medical providers in SmartAdvocate using the following criteria:

- a. Organizations
 - i. Contact Type = Hospital
 - ii. Contact Type = Medical Office
 - iii. Contact Type = Nursing Home
 - iv. Contact Type = Arctrieval Provider
- b. Individuals
 - i. Contact Type = Doctor

Contacts that meet these criteria are treated as Medical Providers (Contacts) within Arctrieval.

2. Importing Medical Providers
 - a. Medical providers are searched and imported from SmartAdvocate into Arctrieval contacts based on the mapping logic above
3. Linking Medical Providers
 - a. An existing Arctrieval contact can be linked to an existing SmartAdvocate contact.
4. Creating Providers in SmartAdvocate (Write-Back Behavior). When a request is created in Arctrieval and linked to a SmartAdvocate case, if there is no link to a SmartAdvocate contact:
 - a. Arctrieval will create a contact within the SmartAdvocate case
 - b. The contact will be assigned the Contact Type: Arctrieval Provider
5. Unlinking Medical Providers
 - a. A linked contact can be unlinked
 - b. Unlinking removes the association but does not delete any data in Arctrieval or SmartAdvocate

ADD NEW ITEM		Picklist Maintenance		Export
Contact Type	Contact Category			Action
Arctrieval Provider	Organization			
Hospital	Organization			
Medical Office	Organization			
Nursing Home	Organization			
Doctor	Individual			
<input type="text"/>	<input type="text"/>			<input type="checkbox"/>
<input type="text"/>	<input type="text"/>			<input type="checkbox"/>

5.5.3. Custom Contact Type Mapping (If Applicable)

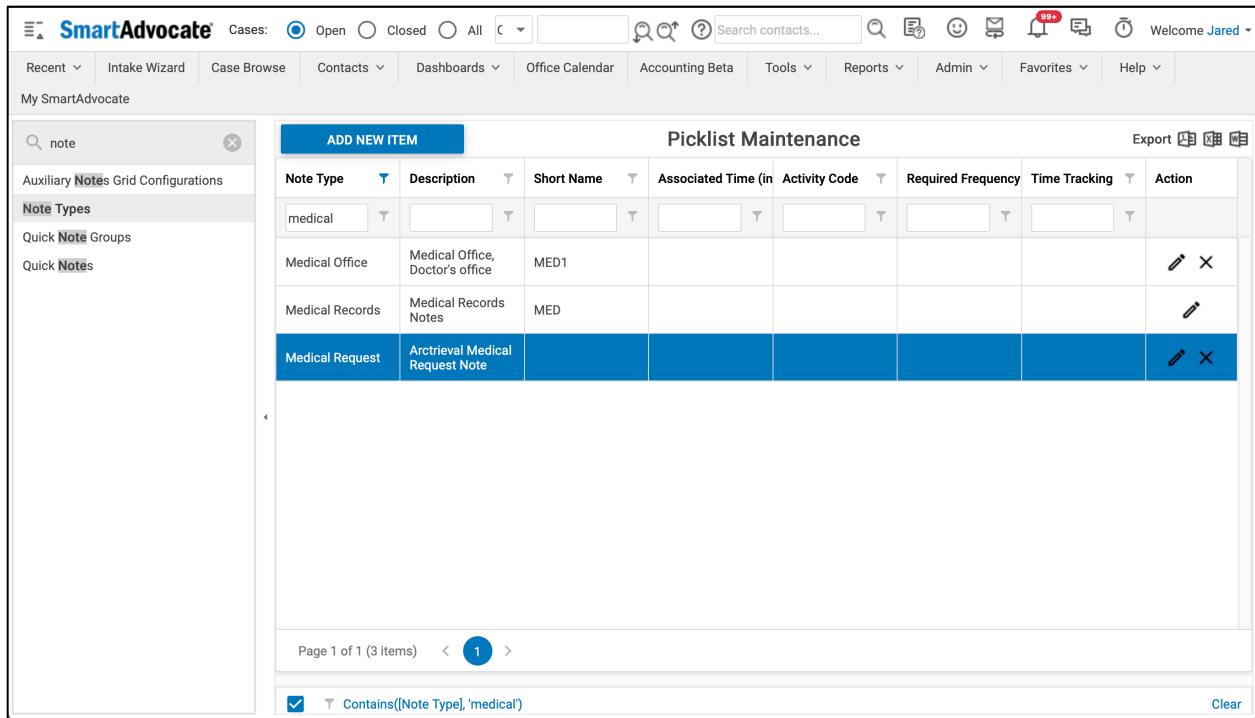
If a firm uses non-standard Contact Types in SmartAdvocate, Arctrieval can support custom mappings to ensure that clients and medical providers are identified correctly during import and synchronization.

5.6. Note Types

If the Case Note option is enabled as described above, you must also add a Medical Request item to the Note Types Picklist. The Medical Request item is required so Arctrievall can synchronize the request information to the associated Case Notes. Here are the steps to add the required item:

1. Click on Picklist Maintenance in the Admin drop-down menu.
2. Enter Note in the search field to filter the results
3. Enter Medical in the Note Type filter

The following page is displayed.



If the Medical Request item is not present, click on Add New Item to enter the information as follows:

1. Note Type is Medical Request
2. Description is Arctrievall Medical Request Note

Click on Update to save the values.

Edit Form ✕

Note Type:

Description:

Short Name:

Associated Time (in minutes):

Activity Code:

Required Frequency:

Time Tracking:

Created at 10/1/2025 10:13:21 AM by Retrieval, Arctrievall.

UPDATE
CANCEL

5.7. System Parameters

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

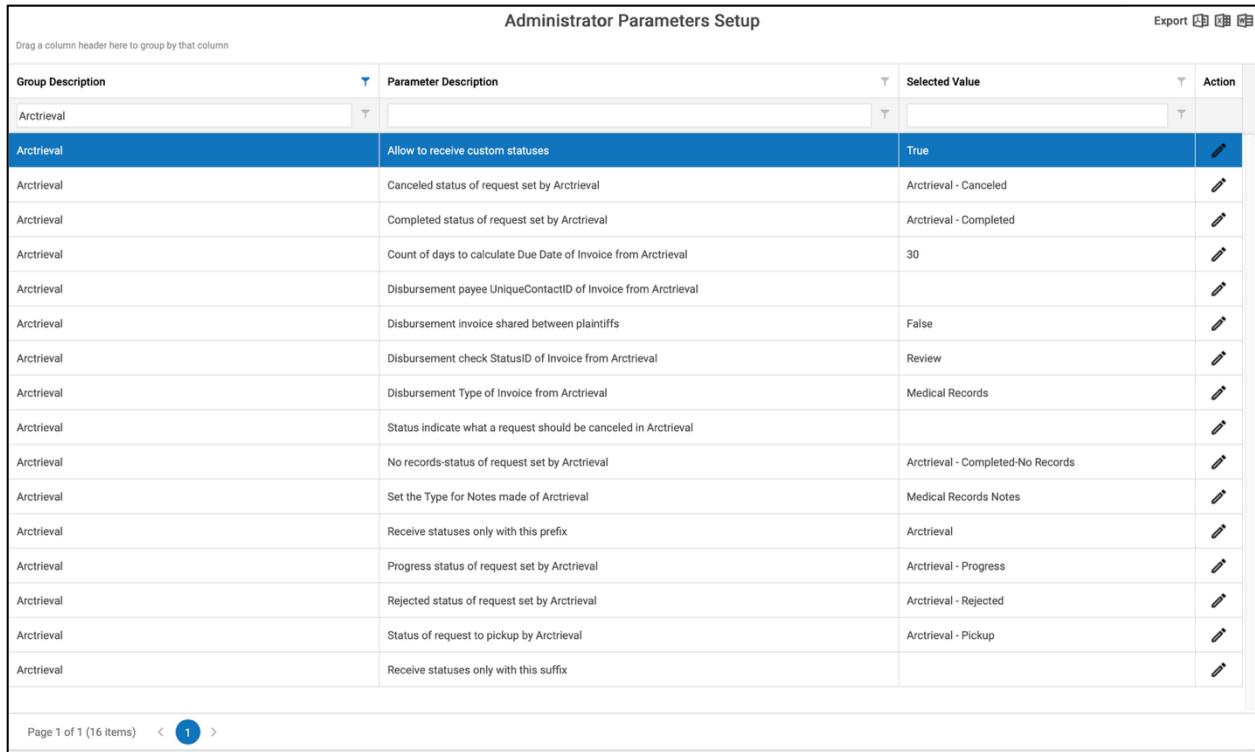
Item	Group Description	Parameter Description	Selected Value
1.	Arctrieval	Allow to receive customer statuses	True
2.	Arctrieval	Canceled status of request set by Arctrieval	Arctrieval – Canceled
3.	Arctrieval	Completed status of request set by Arctrieval	Arctrieval - Completed
4.	Arctrieval	Count of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



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

Arctrieval <> SmartAdvocate Integration Setup Guide

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

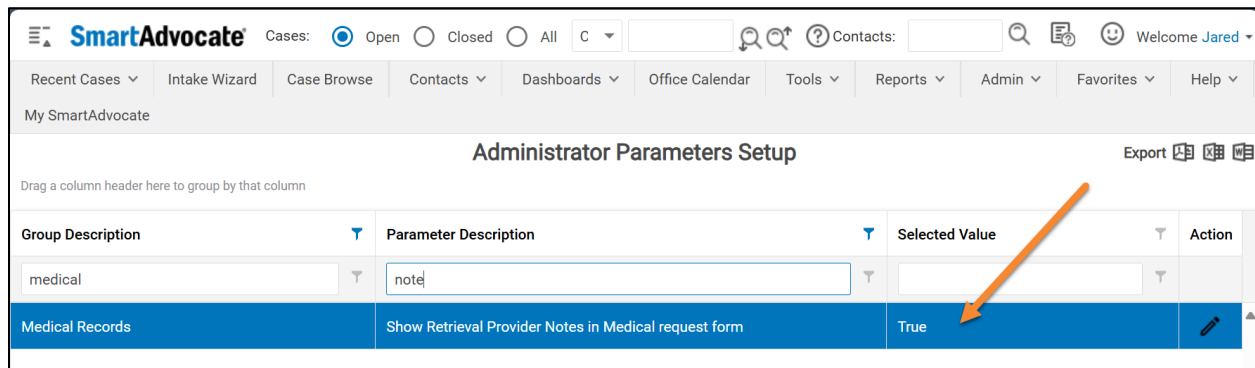


The screenshot shows the 'Administrator Parameters Setup' interface. It features a table with four columns: 'Group Description', 'Parameter Description', 'Selected Value', and 'Action'. The 'Group Description' column is filtered to show only 'Arctrieval'. There are 16 rows of data, each representing a system parameter. The first row is highlighted in blue. At the bottom, it indicates 'Page 1 of 1 (16 items)'.

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

5.8. Display Arctrieval History at Retrieval Provider Notes

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



This screenshot shows the 'Administrator Parameters Setup' interface with a search filter applied to the 'Group Description' column, showing 'medical'. The table lists parameters, and an orange arrow points to the 'True' value in the 'Selected Value' column for the parameter 'Show Retrieval Provider Notes in Medical request form'.

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

5.9. Administrator User API Access Setting

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

Add User

Login name:* jvishney @SALawFirm Is Team

Password:

Contact name:* Vishney, Jared

Default case role:* Attorney

Firm role:* Attorney

Title:* Attorney

Department:

Billing Rate: \$0.00

Teams:

Permission Groups:* Limited Admins

Office:

User Email Login:

User Email Password:

SMTP Server Address:

SMTP Server Port: 0

Enable SSL:

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

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

UPDATE **CANCEL**

6. SmartAdvocate Integration Usage Notes