

Building a Centralized Medical Record Workflow Using Arctrieval and Filevine



Year Founded: 1985

Location: Greensburg, PA

Practice Areas: Workers' Compensation, Social Security Disability, Personal Injury, Long-Term Disability, Veterans' Disability, and Labor Law.

qrglaw.com

We're a plaintiff firm handling disability and injury cases, and our cases are built around medical records. Our clients often have lengthy treatment histories, and it's very rare that they come in with complete documentation. Having the full medical record is critical to building a successful case.

Krystle Brown
Office Administrator

Quatrini Law Group created a centralized medical record workflow using Arctrieval and Filevine to streamline record retrieval, automate record distribution across cases, and enable AI-driven summaries.

The Challenge

Medical records are essential to every case at Quatrini Law Group. Clients are often treated by multiple providers over the course of months and years. Since full documentation is rarely available at intake, gathering an accurate and complete medical history is crucial to building each case.

The challenge grows when a client has multiple active legal matters within the firm. The same medical history may be relevant across disability, personal injury, or other related claims, and it must support several cases simultaneously. Without a shared, complete view of that history, records can become siloed within individual matters, leaving teams unaware of which documentation has already been obtained. Keeping a clear and accurate record of the client's entire medical history is crucial to a positive outcome for each case.

The firm had limited visibility into medical record activity, which caused a significant operational burden. Staff frequently checked with each other to confirm whether requests had been submitted, invoices had been received or paid, and records had been delivered. This led to internal friction that consumed valuable staff time and attention. Additionally, duplicate requests were sometimes sent to providers, increasing administrative work and creating unnecessary costs.

The lack of centralized visibility into medical record activity also created risk to case outcomes. When teams could not determine which records were requested, received, or still missing, it became harder to confirm whether the client's medical history was complete. This uncertainty made it harder to move cases forward and increased the likelihood that important medical information would surface late in the process, affecting strategy and the strength of the case.

"Instead of requesting the same records twice, we put them all in one central place."

Krystle Brown

The firm needed a structured, consistent way to manage medical records within existing workflows while providing clear visibility into what had been requested, what had been received, and what was still needed.

Designing the Workflow

Quatrini Law Group implemented Arc retrieval and integrated it with Filevine, refining internal workflows so medical and billing record retrieval occurs in the same environment staff already used to manage their cases. Rather than treating record requests as a separate administrative task, the firm incorporated retrieval directly into its existing case workflows.

The process begins with streamlined client intake, capturing a digital image of the client's signature via a secure online authorization form. Firms can send clients a link by text message or email, allowing them to review the authorization and sign directly on their smartphone in just a few minutes. Once captured, the digital

signature can be applied to the request documents required to obtain medical and billing records, eliminating delays caused by printing, scanning, or mailing paperwork and accelerating the retrieval process.

Record retrieval activity is now managed within Filevine, creating a centralized structure that keeps documentation accessible across related cases while tied to the appropriate workflow. This ensures that attorneys and staff work from complete and consistent information throughout the lifecycle of a project.

- Staff and attorneys can see when a request has been submitted, whether invoices have been received or paid, and when records are delivered — all without leaving the project. This visibility eliminated the need for internal status checks and manual coordination because, as Krystle noted, “there’s no manual follow-up internally.”
- Teams can quickly confirm the status of requests and access documentation as cases progress. When clients have multiple active matters, staff can verify whether records already exist, preventing duplicate requests and eliminating unnecessary costs.
- Automated provider follow-ups replaced hours of manual outreach and tracking. Rather than relying on staff to repeatedly contact providers for updates, Arc retrieval automatically manages follow-up communication, creating a predictable and standardized request process.

“Our team has a ton of transparency. They can see every step of the process.”
Krystle Brown

Operational Impact

With Arctrieval integrated alongside Filevine, Quatrini Law Group gained better control over medical and billing record retrieval. Automated follow-ups and direct document delivery eliminated the need for staff to manually track requests and upload records between systems. Centralizing record activity also reduced duplicate requests by allowing teams to quickly check whether documentation already exists before submitting a new order. These changes significantly reduced the time staff spent coordinating record retrieval and created a predictable and standardized process across the firm.

"There's no manual follow-up internally anymore. Everyone can see exactly where a request stands."

Krystle Brown

Centralizing medical records within Filevine also improved visibility across projects and practice areas. Records live at the client level, allowing attorneys and staff to view a client's medical history across multiple projects rather than searching through separate files. Once records are received, the firm uses a third-party AI solution to generate medical chronologies and treatment summaries, providing attorneys with organized insights within 24 hours instead of weeks of manual review. Together, these capabilities give the firm a clearer understanding of each client's medical history while helping attorneys prepare cases more efficiently.

Many clients return to the firm for different legal matters throughout their lives. Because medical records are already centralized and accessible, attorneys can quickly understand a returning client's treatment history without rebuilding documentation from the beginning. This allows the firm to respond faster, prepare new cases more efficiently, and continue delivering the level of service that keeps clients coming back.

Arctrieval

See how Arctrieval can solve your record challenges. Request a demo at Arctrieval.com