

ChartSquad Launches Seamless In-App Integration with Clio to Streamline Medical Record Access for Legal Teams

ChartSquad's new Clio integration lets legal teams request, track, and access medical records in Clio, removing manual uploads and speeding up case prep.

HEBER CITY, UT, UNITED STATES, October 14, 2025 /EINPresswire.com/ -- [ChartSquad](#) Launches Seamless In-App Integration with Clio to Streamline Medical Record Access for Legal Teams



Get Medical Records Way Faster

ChartSquad, the leader in [HIPAA-compliant medical record retrieval](#) and AI-powered summaries, today announced its new integration with Clio, the world's most widely used legal practice management platform. This integration enables attorneys and law firms to request, track, and access medical evidence directly inside the Clio platform, transforming how legal teams manage medical documentation.

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By embedding ChartSquad directly inside the Clio platform, attorneys can request, track, and access medical evidence without ever leaving the Clio platform.”

Melanie Carpenter

With the new ChartSquad integration, Clio users can:

- Request medical records directly within Clio, eliminating the need for external portals or manual uploads.
- Track record requests automatically, with real-time updates on status and completion.
- Receive finalized records and summaries instantly inside Clio, stored securely and automatically organized by client and matter.

Together, Clio and ChartSquad are bridging the gap between medical record access and case preparation, enabling faster case progression and improved client outcomes.

“This partnership represents a new era in legal technology,” said Melanie Carpenter, Chief Legal

Officer at ChartSquad. “By embedding ChartSquad directly inside the Clio platform, attorneys can request, track, and access medical evidence without ever leaving the Clio platform. Together, Clio and ChartSquad are redefining what efficiency and advocacy look like in modern legal practice.”

Empowering Firms with Speed, Security, and Simplicity

ChartSquad’s technology gives legal teams fast, transparent access to medical records while ensuring compliance with HIPAA and HITECH standards. Firms using ChartSquad have reported up to 70% faster record turnaround times and significant reductions in administrative labor costs.

By integrating directly into Clio Manage, attorneys can now centralize case workflows from record retrieval to review inside one secure, easy-to-use system.

Availability

The ChartSquad integration is available now to all Clio Manage users in the [Clio App Directory](#) at [app.clio.com](#) or at [chartsquad.com](#). Existing ChartSquad users can connect their accounts and start requesting records immediately.

About ChartSquad

ChartSquad provides a secure, cloud-based platform for medical record retrieval and AI-powered summaries. Built on the belief that “the record set powers everything,” ChartSquad helps legal and insurance teams accelerate case preparation, reduce costs, and improve outcomes through automation, transparency, and patient-driven access.

About Clio

Clio is the leading cloud-based legal software provider, serving tens of thousands of law firms globally. With its suite of products for case management, billing, and client communication, Clio is transforming how legal professionals deliver services to clients.

Melanie Carpenter

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