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A large green diamond-shaped graphic containing a blurred image of a library or law firm's bookshelves. The shelves are filled with books, and the number '5' is visible on the spine of a book in the foreground.

RECORDS RETRIEVAL SERVICES FOR LAW FIRMS



SAVE TIME AND STRESS WITH THIRD-PARTY RECORD RETRIEVAL FROM CSI

Your clients need your legal expertise. But often, it is the non-legal work that can take up large portions of your time. Let CSI handle the administrative burden of third-party record retrieval so you and your team can focus on the strategic legal work that benefits your clients most. Whether your case requires medical records, film records, billing records, court records, employment records, records from Federal agencies or other documentation from third parties, you can depend on CSI's experience, support, and speed.

BENEFITS OF OUTSOURCING THIRD-PARTY RECORD RETRIEVAL TO CSI:



EXPERTISE



EFFICIENCY



PERSONALIZED SERVICE



VISIBILITY



EASE OF USE

CSI has years of experience retrieving third-party records and can handle all your needs. Our team has extensive experience drafting authorizations, subpoenas, and Depositions on Written Questions, domesticating subpoenas, and managing process service. We take care of all location and address confirmations and front all custodial fees. And our follow-up with custodians on records retrieval is unmatched. Law firms who use CSI for third-party record retrieval appreciate our personalized service and that they always deal with a real person for any orders or questions.

PERSONALIZED SERVICE



We recognize that every case is different, and that each client and each firm has its own needs and preferences. We pride ourselves on our flexibility to meet these unique and specific needs. We work directly with our clients to ensure that orders, invoices, and records are managed, tracked, and executed precisely as requested. Firm preferences are welcome and are fully documented and honored so that each party involved in a records order receives what they require.

EXPERTISE AND EFFICIENCY



Records retrieval is messy and can be confusing, but CSI has third-party records retrieval experience and expertise in every state, and in virtually every jurisdiction. CSI clients can rest assured that we stay up-to-date and follow local rules of civil procedure. We adhere to jurisdiction-specific best practices for retrieving third-party records. Our team also has extensive experience domesticating subpoenas and drafting DWQs. Our experienced team members will address any issues with custodians to make sure that we collect and deliver the best product for your case, as quickly as possible.

SUBPOENA PREP SERVICE

CSI prepares original subpoenas for counsel approval and signature. All custodial fees are advanced, and the status of your records is accessible online. Once records are received, you may view, print, and save from CSI Cortex™ our HIPAA-compliant online repository. After we complete your records retrieval request, CSI can also send hard copies of records secured. Copy requests for opposing counsel are fulfilled by our expert staff of litigation support specialists.

PROCESS SERVICE

After subpoenas are executed, CSI arranges for process service to serve the subpoenas. Once service has been confirmed, you receive an update via email. When the notarized affidavit of service has been received, CSI will update your account in CSI Cortex with details of service.

AUTHORIZATION RECORDS SERVICE

CSI provides records by authorization, directly reducing administrative costs. Upon receipt of the signed authorization, CSI processes each order promptly by serving a copy of the release, together with a declaration of custodian of records to each facility. CSI's dedicated, relentless follow-up with custodians is managed to provide turnaround on document retrieval services, including medical records and medical bills, as well as payroll and employment records, as quickly as possible.

VISIBILITY AND EASE OF USE



The retrieval of third-party records can be arduous. With potentially hundreds of records from dozens of locations, it can be challenging to know the status of each third-party records retrieval project. CSI Cortex™ – our exclusive litigation support platform – provides full visibility into the status of every request for third-party records retrieval. Information is easy to find and view in one central location. Access to updates is available in real time, 24 hours a day, 7 days a week.

HIGHLIGHTS OF CSI CORTEX:

SPEED

Easy ordering - simplified scheduling for all your litigation needs saves you time

- **Place records retrieval orders fast** – data entry fields are streamlined to only the most pertinent information needed to place an order
- **Schedule deposition services easily** – scheduling for court reporters, videographers, interpreters, facilities, and technology support for depositions, arbitrations, and mediations is seamless

VISIBILITY

Personalized dashboard - get a comprehensive view of all your activity at a glance

- **Order tracking** – instantly view the status of each order
- **Actions and alerts** – notifications of any actions required, or responses needed, related to your requests
- **Invoice management** – listing of all invoices, including payment status and the option to download, print, and pay online

SECURE

Security – secure login and communications

- **Secure and encrypted** – CSI Cortex is HIPAA compliant with permission-based access
- **Simplified communications** – all communications and updates related to your requests are logged and timestamped to keep you updated

CONTACT CSI TODAY FOR HELP WITH YOUR LITIGATION SUPPORT NEEDS

CRITICAL COMMUNICATIONS
LITIGATION PSYCHOLOGY



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RECORDS & DEPOSITIONS
TRIAL CONSULTING

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