



## **eBilling User Guide for Legal Departments Version 3.40**

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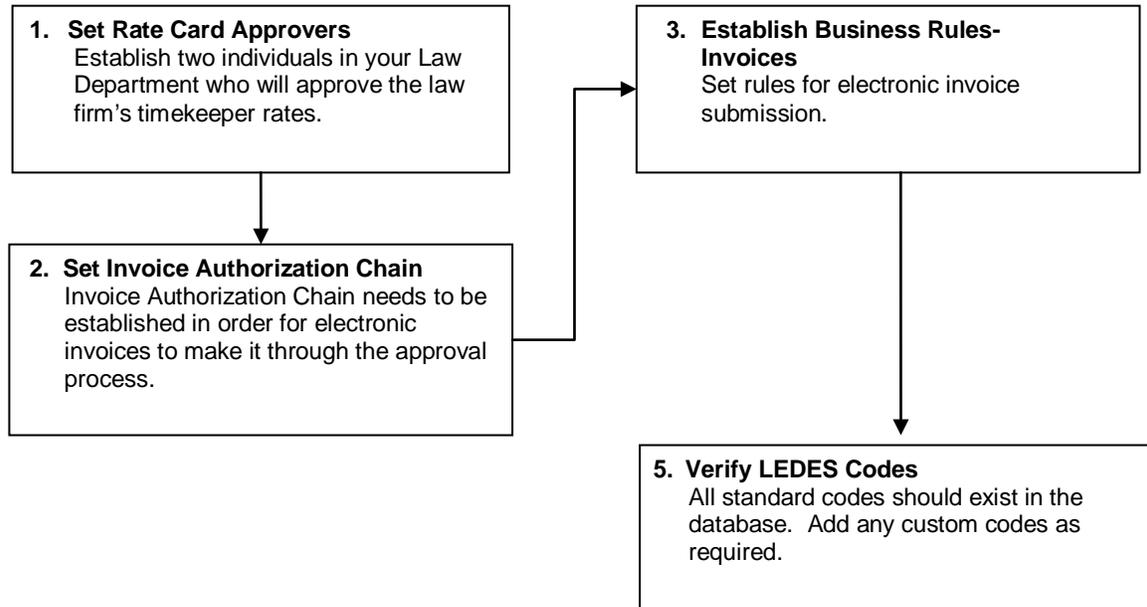
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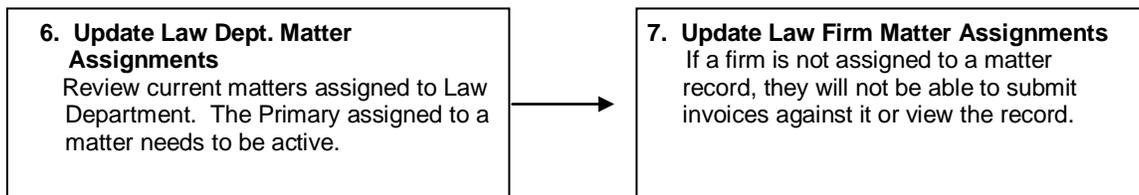
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# Law Department Processes Flow Chart

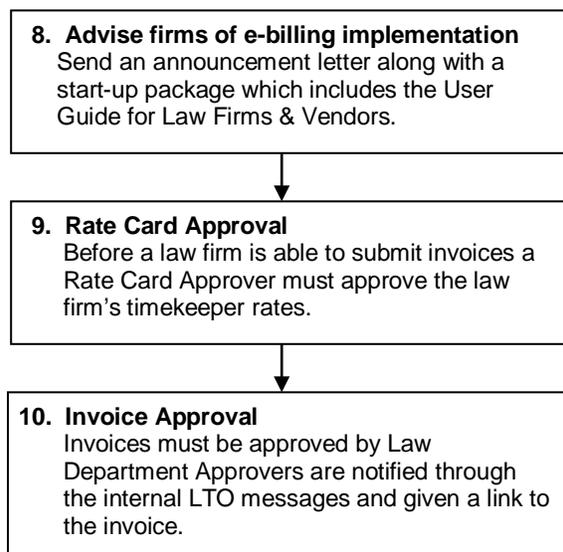
## Phase 1



## Phase 2



## Phase 3



## Law Department Processes

The following are steps in which the Law Department needs to complete in order to receive invoices electronically.

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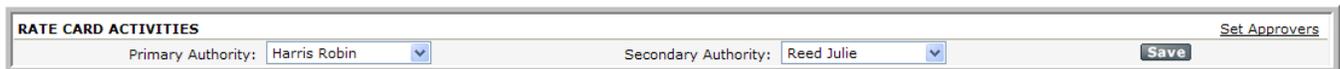
The following tasks need to be completed by the appropriate law department personnel in order to receive invoices electronically.

### 1. Set Rate Card Approvers

Location: [Administration](#) | [Firms & Vendors](#) | [Rate Card Activities](#) | [Set Approvers](#)

Select two individuals as Rate Card Approvers...one as a Primary Rate Card Approver and one as the Secondary Rate Card Approver.

The selected individuals must have Administrator rights.



The screenshot shows a web interface titled "RATE CARD ACTIVITIES". On the right side, there is a "Set Approvers" link. Below this, there are two dropdown menus: "Primary Authority:" with "Harris Robin" selected, and "Secondary Authority:" with "Reed Julie" selected. A "Save" button is located to the right of the secondary authority dropdown.

**Note:** As a general rule of thumb, each Law Firm will have the following Rate Cards:

**ONE rate card for the Law Firm ("Company") itself**, where rates for Expenses / Disbursements are listed. (Example: Telephone charges, copy charges, etc.) This rate card would ONLY contain rates for LEDES codes beginning with the letter "E". This rate card should NOT have any hourly rates assigned to it.

**ONE rate card for EACH BILLING INDIVIDUAL** within the Law Firm, where HOURLY rates for the Individual are listed. These individual rate cards could contain rates for any LEDES code EXCEPT those beginning with the letter "E". There should be no expense rates ("E" codes) on these individual rate cards.

### 2. Set Invoice Authorization Chain

Location: [Corporate Staff](#) | [Legal Staff](#) | Click a staff member's name | Site Access tab

Invoice approval authority is granted on a per person basis. To be included in an Invoice Approval Chain, an individual must have the 'Can Function as a Primary' option activated.

When setting up an Invoice Authorization Chain, always start with the person that will have the highest amount of authorization - the last person in the chain.

- ✓ Set the dollar limit of the individual's approval permission by clicking the Edit link to the 'Can Approve Invoices Up To' field.

- ✓ Click the checkbox for “This person will always have final authority. No others will follow.” You would only check this for the highest person in the chain. The designation “Final Authority” will display in the ‘Hands Invoices Off To’ field.
- ✓ Continue building the chain by setting the Invoice Authorization fields for the next individuals down the chain.

Each electronic invoice submitted to LTO will automatically go first to the person listed as the Primary on the matter record. From there, LTO will read the Invoice Authorization Chain, and send the invoice to other approvers, based on the dollar amount involved. However, if an Alternate Approval Chain is set on a matter the invoice will automatically be routed based on the Alternate Approval Chain set for that matter.

If the invoice total is within the authorization amounts of the Primary, then that individual will have final authority for that invoice and the invoice will not be routed to the next person in the chain.

Note: The term “Primary” refers to the lead role on a matter’s internal legal team; the actual caption for this role on your site may be different.

**Invoice Authorization**

Can Function As A Primary?   << Click To Remove Authority

Can Approve Invoices Up To: \$20,000.00 

Hands Invoices Off To: F. Orzo 

The above authorization settings operate as a separate function than the other items on this screen.  
If applicable, make changes to this area first.

To see an overview of the authorization amounts of individuals in the Legal Department go to: [Administration](#) | [Legal Dept](#) | [Invoice Authorization Amounts](#).

<a href="#">Brian Invoicer</a>	100	C. Invoicer
<a href="#">Julie Reed</a>	500	A. TestAdmin
<a href="#">Cynthia Strider</a>	500	M. Sidoti
<a href="#">John Ross</a>	500	A. TestAdmin
<a href="#">Jenell Vanel</a>	500	S. Barriteau
<a href="#">Stephen Sanford</a>	1,000	J. Harris
<a href="#">Charlie Invoicer</a>	1,000	D. Invoicer
<a href="#">Marisa Sidoti</a>	1,000	M. Sidoti
<a href="#">Erin Villeneuve</a>	1,000	A. TestAdmin
<a href="#">Adam TestAdmin</a>	3,000	A. TestAdmin
<a href="#">Daniel Invoicer</a>	10,000	E. Invoicer
<a href="#">Patricia Glisson</a>	15,000	S. Barriteau
<a href="#">Susanne Barriteau</a>	30,000	S. Barriteau
<a href="#">Yogesh Tyagi</a>	50,000	Y. Tyagi
<a href="#">IH02 Abby</a>	100,000	I. Abe
<a href="#">IH01 Abe</a>	1,000,000	I. Abe
<a href="#">Edward Invoicer</a>	1,000,000	J. Harris
<a href="#">Jim Harris</a>	5,000,000	E. Invoicer

To view existing invoice approval chains go to: [Reports](#) | [Support](#) | [Invoice Approval Chain with Approval Limits.](#)

INVOICE APPROVAL CHAINS	
Brian Johnston	\$1.00
....Edward Invoicer	\$1,000,000.00
....Jim Harris	\$5,000,000.00
.... ....Edward Invoicer	\$1,000,000.00
.... .... ....Jim Harris	\$5,000,000.00

**Alternate Approval Chain:** You can set up an Alternate Approval Chain by Matter.

- ✓ Select the matter
- ✓ Click Corporate Staff
- ✓ Click Legal Team
- ✓ Invoice Approval Chain

The Default Approval Chain is listed. To add an alternate approval chain click "Set Alternate Approval Chain" and a drop-down list is provided. Here is where you will build your chain.

Things to know about setting the Alternate Approval Chain:

- ❖ Add the people in the order you want the chain to go.
- ❖ You can list the same person in two positions. For example, the same person can be listed in the first and last positions.
- ❖ Alternate approval chain does bypass the authorization limits...it is not based on dollar amounts.
- ❖ Alternate Approval Chain overrides the Default Approval Chain. So, when an invoice comes in Lawtrac will review the matter to see if there is an Alternate Approval Chain listed and the invoice will follow the alternate approval chain instead of the Default Approval Chain.

INVOICE APPROVAL CHAIN	
<p><b>DEFAULT APPROVAL CHAIN</b></p> <p>1. Robin Harris 7,000</p> <p>2. Jim Harris 10,000,000</p>	<p><b>ALTERNATE APPROVAL CHAIN</b></p> <p style="text-align: center;"><a href="#">Set Alternate Approval Chain</a></p>
<div style="border: 2px solid blue; border-radius: 15px; padding: 5px; display: inline-block;">Build Alternate Approval Chain HERE</div>	
<p><b>SET ALTERNATE CHAIN</b></p> <p>1. <input type="text" value="Abe, Barbara"/> <input type="button" value="Set"/></p>	<p style="text-align: right;"><a href="#">Stop / Close</a></p> <p>An alternate chain can be made-up from anyone in the legal department regardless of any invoice approval amount.</p> <p><b>Important:</b> Invoice Alternates <b>WILL</b> Have Access To The Matter Record.</p>

### 3. Establish Business Rules (Invoices)

There are two sets of Business Rules:

- ❖ Standard LEDES Processing Rules
- ❖ Advanced LEDES Processing Rules – include the Standard LEDES Rules plus 17 additional rules.

#### Standard LEDES Processing Rules

Location: [Administration](#) | [Finance](#) | [LEDES Processing Rules \(Standard\)](#)

You may wish to review the switches in this area to set rules for electronic invoice submissions.

**LEDES INVOICE PROCESSING**

Outside Counsel Can Transmit LEDES Invoices:  -On  -Off

Block Final Submit If Released On Matter:  -On  -Off

Invoice Fiscal Year / Quarter Based On: Invoice Date

Check Individual Assignments On Line Items:  -On  -Off

Automatically Assign Individual To Matter:  -On  -Off

Automatically Delete Pending Invoices After: 90 Days

**--RATE CARD RULES--**

Compare Transmitted Invoices to Rate Cards:  -On  -Off

Use One Rate Card Per Company:  -On  -Off

Check Fee Items Only Against Rate Card/s:  -On  -Off

All Disbursement Items To Company Rate Card:  -On  -Off

**\*\*Only one rule at a time can be engaged (or none of the 3 rules is engaged).**

#### **Explanations:**

Outside Counsel Can Transmit LEDES Invoices: Set to “On” to allow Outside Counsel to submit LEDES Invoices electronically.

Block Final Submit If Released On Matter: Set to “On” to prevent Outside Counsel from submitting invoices against a matter from which they have been released.

Invoice Fiscal Year/Quarter Based On: Select whether to base the fiscal year rate card comparison of a LEDES invoice on Invoice Date or Period From or Period To.

Check Individual Assignments On Line Items: Set to "On" if you want to block invoice line items where the timekeeper is not directly assigned to the matter. So, if a timekeeper bills on a matter that you have not directly assigned them to the application will reject the invoice if it is set to "On". If you set it to "Off" you are telling the application to allow a timekeeper, who is not directly assigned to the matter, to submit time against the matter.

Automatically Assign Individual to Matter: Set to "Off" if you do not want Lawtrac to automatically assign a law firm staff member to a matter upon receiving a line item that includes that individual's TimekeeperID. Set to "On" if you want Lawtrac to automatically assign the law firm staff member to the matter.

Automatically Delete Pending Invoices After # of Days. Fill in number of days before an Unapproved invoice will be automatically deleted.

### **--RATE CARD RULES--**

Compare Transmitted Invoices to Rate Cards: Set to "On" to make the application compare the invoice line item expenses/disbursements to the Company rate card and compare the fee line items to the staff members' rate cards. Line items over the approved rate will generate an automatic error message to the firm, as will line items for unapproved LEDES codes. The invoice cannot be transmitted until the line item costs are within the approved rate card amounts for the timekeeper. *For example, let's say John Doe's rate is approved for \$250 and copying fees are approved for .10 per copy and an invoice is submitted with John Doe billing at a rate of \$255 and copying expenses are listed on the invoice at .11 per copy then the application will reject the invoice since both amounts are over the approved rates.*

If the legal department determines that they do not want the application to check rate cards when a LEDES invoice is being submitted, this option should be turned Off. This setting is not specific to expenses. It is for all types of line items.

**\*\*Only one rule at a time can be engaged (or none of the 3 rules is engaged).**

\*\*Use One Rate Card Per Company: Set to "On" to set the application to only check the Company rate card. Rate cards for timekeepers are not required. If the legal department determines that they do not want the application to check rate cards when a LEDES invoice is being submitted, this option should be turned Off. This setting is not specific to expenses. It is for all types of line items.

\*\*Check Fee Items Only Against Rate Card/s: Set to "On" to compare only Fee items to staff members' rate card/s. Disbursement items would not be checked against rate cards. *For example, we'll use the same scenario as above. The invoice will get rejected because the rate the law firm is billing on this invoice, for John Doe (\$255.00) is over the approved rate of \$250.00. The application is not going to check the copying expense rate because*

by selecting ON for this rule we are only telling the application to check Fee items against the rate cards. The copying expense is not getting check against any rate card.

**\*\*All Disbursement Items To Company Rate Card:** Set to "On" to limit the comparison of Disbursement line items to the firm's rate card, rather than to the rate card/s of other timekeepers in the firm. Fee items would not be checked if this is set to "On".

For example, we'll use the same scenario as above. The invoice will get rejected because the rate they are billing on the invoice for copying (.11) is over the approved rate of .10. The application is not going to check John Doe's rate card because by selecting ON for this rule we are only telling the application to check Disbursement items against the Company Rate Card. John Doe's rate is not getting check against his rate card.

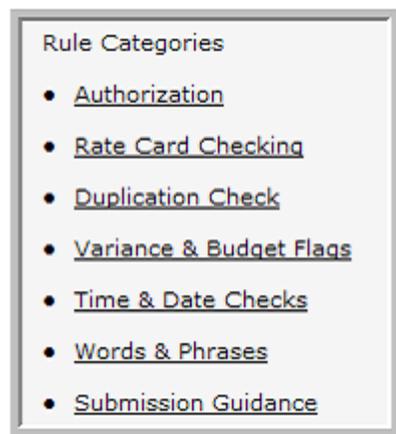
### **Advanced Processing Rules**

[Administration](#) | [Finance](#) | [LEDES Processing Rules](#) | [Advanced Processing Rules](#)

The Advanced Processing Rules include the Standard Processing Rules as well as 17 additional rules.



Advanced Processing Rules are based on the below categories:



Explanations of each rule along with screen shots of what the legal department will see when the rule is flagged as well as what the law firm sees when the rule is flagged/violated is provided.

## Authorization Rules (R100-R102)

### R100 Block Invoices from Released Firm(s)

#### Legal Department Language

Engaging this rule (box is checked) allows *LAWTRAC* to automatically reject any attempt by a **released** law firm to submit an invoice electronically. Once a firm is released from a matter, any request for payment must be submitted directly to the legal department in the form of a hard copy (paper) invoice. In addition, if a law firm attempts to submit an invoice with **multiple matters** and they have been released from **any one** of those matters, the entire submission process will be voided and the invoice rejected. If this rule is **not** engaged (box not checked), *LAWTRAC* **will allow** released law firms to submit invoices electronically.

**Legal Department View** Does not receive the invoice.

#### Outside Counsel Language

If your firm has been released from a matter for which you are attempting to submit an invoice, the entire submission process will be voided and the invoice rejected. In addition, if you are attempting to submit an invoice with **multiple matters** and your firm has been released from **any one** of those matters, the submission process will be voided and the invoice rejected in its entirety.

#### Outside Counsel View

DATA RECEIVED		2 Rows Received across 1 Invoices	
R100_ON_Firm2_Matter	Rows: 2	100.00	
		Total Received: 100.00	
<b>ASSIGNMENT TO MATTER RECORDS NOT VERIFIED</b> <b>CONTACT Top Button Shirts, Inc.</b>			

### R101 Check Individual Timekeeper Assignments

#### Legal Department Language

Each line of the invoice will be examined to ensure the timekeeper billing on a matter has been **assigned** to that matter. If this rule is engaged (box is checked) and the in-house legal department has not authorized/assigned the specific timekeeper to work on the matter, the line item will be automatically adjusted down to \$0.00 and flagged as "Unauthorized Timekeeper is Submitting Billing". If this rule is **not** turned on (box not checked), the application **will allow** any timekeeper to submit time on the matter, regardless of whether or not they have been assigned to the matter.

#### Legal Department View

 <b>L200   Pre-Trial Pleadings and Motions</b> Ann Alpha 0.50 hrs. @ 100.00 per hr. Adjustment: -50.00 Date Incurred: 01/28/10 receipt and consideration Co-Defendant's Motions;	0.00 
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\*\*\*Click magnifying glass to see rule violation detail.

**RECORDED COMMENTS**  
 -Rules Flag  
 Unauthorized Timekeeper is submitting billing.

**Outside Counsel Language**

Each timekeeper on the invoice will be checked to ensure that they are authorized/assigned to bill on the matter. If a timekeeper has **not** been assigned to a matter, *LAWTRAC* will automatically adjust the line down to \$0.00 and flag the invoice as "Unauthorized Timekeeper is Submitting Billing".

**Outside Counsel View**

ADJUSTMENT/S RECORDED				
Invoice No.	COMMENT/S	SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
R101_tkassigned	 <b>Unauthorized Timekeeper is submitting billing</b> <small>Timekeeper Code: aa   LEDES Code: L200   Line Item Date: 20100128</small>	50.00	0.00	-50.00

**R102 Automatic Timekeeper Assignment**

**Legal Department Language**

Rather than flagging an unauthorized timekeeper for your attention (rule R101), engaging this rule will automatically assign a timekeeper to the matter they are billing against; even though in-house has **not** previously assigned them to that matter. A flag will appear on the invoice stating "Timekeeper has been Assigned to Matter". If this rule is **not** engaged (box not checked), *LAWTRAC* **will not** automatically assign a timekeeper.

**Legal Department View**

 **L200 | Pre-Trial Pleadings and Motions**  
 Dale Delta 0.50 hrs. @ 50.00 per hr. Date Incurred: 01/28/10  
 receipt and consideration Co-Defendant's Motions; 25.00 

\*\*\*Click magnifying glass to see rule violation detail.

**RECORDED COMMENTS**  
 -Rules Flag  
 Timekeeper has been Assigned to Matter.

**Outside Counsel Language**

If a timekeeper who has not been assigned to a matter is included on an invoice for that matter, the association of timekeeper to matter will be made automatically. A flag will appear on your invoice stating "Timekeeper has been Assigned to Matter".

**Outside Counsel View**

OTHER NON-ADJUSTMENT FLAGS	
R102_ON_Firm1_Matter	 Timekeeper has been Assigned to Matter <small>Timekeeper Code: dd   LEDES Code: L200   Line Item Date: 20100128</small>

## Rate Card Checking Rules (R200-R205)

### R200 Validate Timekeeper Rate Card

#### Legal Department Language

When this rule is engaged (box is checked), all incoming lines will be compared against the timekeeper's rate card. If the amount charged exceeds the approved rate, *LAWTRAC* will adjust the line downward to reflect what has been approved.

In cases where you want all disbursements (expenses) to be compared to the company rate card, your company **must** have authorized rates for those items (copies, meals, travel, etc). Any rate that has been set to zero (0) will be considered **non-billable**.

#### Legal Department View

 L200   Pre-Trial Pleadings and Motions Ann Alpha 1.00 hrs. @ 500.00 per hr. Adjustment: -100.00 Date Incurred: 01/28/10 receipt and consideration Co-Defendant's Motions;	400.00 
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\*\*\*Click magnifying glass to see rule violation detail.

#### Outside Counsel Language

All lines will be measured against the timekeeper's approved rate card. If any charge is found to be greater than the timekeeper's approved rate, *LAWTRAC* will adjust the line downward to reflect the approved rate. Your firm has the option to edit the rate card and request approval of the higher rate or request a waiver for a particular charge by contacting the in-house legal department.

#### Outside Counsel View

ADJUSTMENT/S RECORDED		SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
Invoice No. R200_ON_Alpha1-27	COMMENT/S  Line is over approved rate. Submitted: 500.00 Approved: 400.00 Timekeeper Code: AA   LEDES Code: L200   Line Item Date: 20100128	500.00	400.00	-100.00

### R201 Validate Task Code Maximum Amount per Invoice

#### Legal Department Language

All the lines within an invoice will be summed for each LEDES code submitted. If the total of all lines exceeds the maximum dollar amount set for that code per invoice, a flag will appear for the approver's review. No automatic adjustments to the invoice amount are made. This rule supersedes rate card approvals.

In order to select a maximum amount for a specific task code, go to:

- ✓ Administration
- ✓ Finance
- ✓ LEDES Codes
- ✓ Click the task code
- ✓ Fill in the total amount box in the Maximum Allowed Per Invoice section
- ✓ Save Code Settings

## Legal Department View

 <b>E101   Copying</b> 50,000.00 Items @ 0.10 ea. Date Incurred: 01/28/10 Max Rate	5,000.00 
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------

\*\*\*Click magnifying glass to see rule violation detail.

**RECORDED COMMENTS**

 -Rules Flag  
The total of all the lines, on this invoice, exceed the maximum dollar amount (20.00) set for this code.

## Outside Counsel Language

The total of all lines billed against the same LEDES code exceeds the maximum amount set by the in-house legal department for that code. The invoice will be reviewed by the in-house legal department and either accepted or rejected.

## Outside Counsel View

**OTHER NON-ADJUSTMENT FLAGS**

R201Jan27AB	 The total of all the lines, on this invoice, exceed the maximum dollar amount (20.00) set for this code. Timekeeper Code:   LEDES Code: E101   Line Item Date: 20100128
-------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## R202 Total Hours/Count Threshold per Invoice

### Legal Department Language

All the lines within an invoice will be examined for the maximum hours/count you have set for each LEDES code. If the total hours/count of all the lines (together) exceeds the maximum set for that code, a flag will be placed on each of the lines on the invoice with that specific LEDES code for the approver's review. This supersedes any rate card approvals. No automatic adjustments to the invoice amount are made.

In order to select a maximum amount for a specific task code, go to:

- ✓ Administration
- ✓ Finance
- ✓ LEDES Codes
- ✓ Click the task code
- ✓ Fill in your maximum hours/count allowed per invoice
- ✓ Save Code Settings

## Legal Department View

 <b>E101   Copying</b> 600.00 Items @ 0.10 ea. Date Incurred: 01/21/10 receipt and consideration Plaintiff's supplemental responses which identify one Corpus Christi plaintiff; check alleged work history dates against ABC ownership;	60.00 
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\*\*\*Click magnifying glass to see rule violation detail.

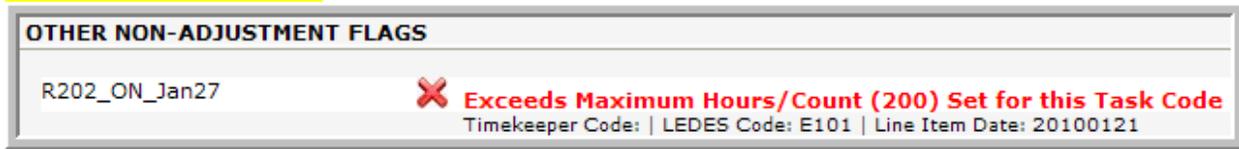
**RECORDED COMMENTS**

 -Rules Flag  
Exceeds Maximum Hours/Count (200) Set for this Task Code.

### Outside Counsel Language

Some LEDES codes have been set to accept a maximum hours/count per invoice by the in-house legal department. If your invoice has crossed that maximum threshold, it will be flagged for the approver's review.

### Outside Counsel View



## R203 Maximums at the Matter Level

### Legal Department Language

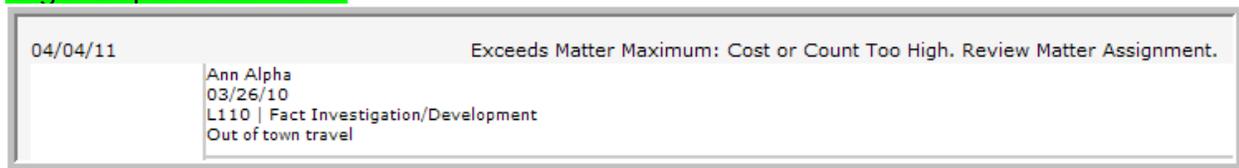
This rule is to be set at the matter level. Please note that there are three options that you can enable.

You can restrict a LEDES code from being submitted. If a restricted code is submitted, *LAWTRAC* will negate the charge bringing the line amount to \$0.00.

You can set a maximum count and/or a maximum cost per LEDES code. All the lines within an invoice will be summed for each code. If the total of all the lines (together) exceeds the maximum settings for that code, a flag(s) will be placed on the invoice for the approver's review. No automatic adjustments to the invoice amount are made.

**IMPORTANT NOTE:** If you also have rule R200 enabled, you will be notified of any rate card violations as well as the fact that this specific task code has been restricted on this specific matter.

### Legal Department View



### Outside Counsel Language

An invoice has been submitted which contains a restricted LEDES code or which exceeds a maximum count and/or cost that has been set for a specific matter. In the case of a restricted LEDES code, *Lawtrac* will negate the charge bringing the line amount to \$0.00. If the maximum count or cost has been exceeded, *Lawtrac* will flag the invoice for the approver's review. No automatic adjustments to the invoice amount are made.

## Outside Counsel View

ADJUSTMENT/S RECORDED				
Invoice No.	COMMENT/S	SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
R203Count328	 <b>Restricted LEDES Code.</b> Timekeeper Code: GG   LEDES Code: e115   Line Item Date: 20100325	115.00	0.00	-115.00
OTHER FLAGS				
R203Count328	 Count Exceeds Maximum Allowed For Matter (3) Timekeeper Code: AA   LEDES Code: L110   Line Item Date: 20100326			
	 Count Exceeds Maximum Allowed For Matter (3) Timekeeper Code: GG   LEDES Code: L110   Line Item Date: 20100326			

## R204 Restricted Task Codes

### Legal Department Language

Specific task codes can be identified by the in-house staff as **restricted** (non-allowable) on any invoice, at any time, for any reason. This is not a matter level setting but a global setting.

To select the code you want to restrict, go to:

- ✓ Administration
- ✓ Finance
- ✓ LEDES Codes
- ✓ Click the task code
- ✓ Click the box beside "RESTRICT this code on ALL invoices"
- ✓ Save Code Settings.

If a restricted code is submitted when this rule is engaged, *LAWTRAC* will automatically negate the charge bringing the line amount to \$0.00.

### Legal Department View

 <b>E110   Out-of-town Travel</b> 1.00 items @ 100.00 ea. Adjustment: -100.00 Date Incurred: 01/25/10 receipt and consideration Co-Defendant's Motions;	0.00 
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\*\*\*Click magnifying glass to see rule violation detail.



## Outside Counsel Language

Some task codes may be **restricted** from being used by the in-house legal department. If a restricted code is submitted on an invoice, *LAWTRAC* will negate the charge bringing the line amount to \$0.00.

## Outside Counsel View

ADJUSTMENT/S RECORDED				
Invoice No.	COMMENT/S	SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
Rule204Feb10	 <b>Restricted LEDES Code</b> Timekeeper Code:   LEDES Code: E110   Line Item Date: 20100125	100.00	0.00	-100.00

## R205 Required Codes

### Legal Department Language

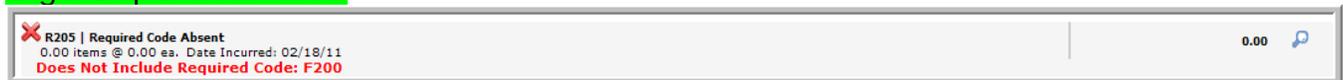
By engaging this rule, you can require law firms to use specific codes on every LEDES invoice they submit. This is not a matter setting but a global setting. For example, if you require discounts on every invoice, you can use this rule to activate the "discount" code you want the firms to use on each invoice they submit.

You can designate the **required** code by going to:

- ✓ Administration
- ✓ Finance
- ✓ LEDES Codes
- ✓ Click the task code
- ✓ Click the box beside "REQUIRE this code on ALL invoices"
- ✓ Click Save Code Settings.

If a submitted invoice is missing one or more required codes, *LAWTRAC* will flag the invoice advising the approver of the omission(s).

### Legal Department View



### Outside Counsel Language

The in-house legal department may **require** that your law firm use specific codes on **every** invoice. If this is the case, invoices submitted without these codes will be flagged for the approver's attention.

### Outside Counsel View



## Duplication Check Rules (R300)

### R300 Duplication of Specific Line within an Invoice

#### Legal Department Language

Each line item in an invoice will be compared against all the other line items within that same invoice. If the date the work was performed, the timekeeper, the LEDES code as well as the hours/count are all the same on any two lines, these lines will be flagged for the approver's attention. Turning this rule on may pull a lot of data. The application is looking for lines that contain the same timekeeper, transaction date, LEDES code and units/hours. As you can see, in the example below, all these fields are the same but the line description is different.

## Legal Department View

 L200   Pre-Trial Pleadings and Motions Ann Alpha 1.00 hrs. @ 100.00 per hr. Date Incurred: 01/25/10 receipt and c Co-Defendant's Motions;	100.00	
 L200   Pre-Trial Pleadings and Motions Ann Alpha 1.00 hrs. @ 100.00 per hr. Date Incurred: 01/25/10 receipt and consideration Plaintiff's supplemental responses which identify one Corpus Christi plaintiff; check alleged work history dates against ABC ownership;	100.00	 

\*\*\*Click magnifying glass to see rule violation detail.

**RECORDED COMMENTS**  
 -Rules Flag  
Appears to duplicate another line within this invoice.

## Outside Counsel Language

Lines which appear to be exact duplicates of other lines within the same invoice will be flagged for the approver's attention. The date worked, timekeeper, LEDES code **and** hours/count must all be identical.

## Outside Counsel View

OTHER NON-ADJUSTMENT FLAGS	
R300_ON_Jan31	 <b>Appears to duplicate another line within this invoice.</b> Timekeeper Code: AA   LEDES Code: L200   Line Item Date: 20100125
	 <b>Appears to duplicate another line within this invoice.</b> Timekeeper Code: AA   LEDES Code: L200   Line Item Date: 20100125

## Variance and Budget Flags (R400-R402)

### R400 Invoice-to-Combined Budgets of ALL Outside Counsel per Matter

## Legal Department Language

When this rule is engaged (box is checked), an incoming invoice will be measured against all budgets that have been established by all outside counsel for a matter. *LAWTRAC* will notify the approver of the current status of a matter in relation to the total combined budget for that matter; be it 10% or 110%.

PLEASE NOTE: Only those firms with an approved budget will be included in a "combined" budget. However, even firms **without** a budget can submit an invoice which will then be measured against the combined budget for a particular matter.

## Legal Department View

 R400   Fiscal Budget-to-Invoice (All Assigned) 0.00 Items @ 0.00 ea. Date Incurred: 02/20/11 Matter is now at 53% of its combined budgets.	0.00	
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------	---------------------------------------------------------------------------------------

### Outside Counsel Language

This invoice is being measured against all budgets that have been established by all outside counsel for a given matter. *LAWTRAC* will notify the approver of the current status of a matter in relation to the total combined budget for that matter; be it 10% or 110%.

### Outside Counsel View

OTHER NON-ADJUSTMENT FLAGS	
R400A	 Budget Warning Timekeeper Code:   LEDES Code:   Line Item Date: 20110220

View when firm reviews the invoice, a line is added to the invoice to provide firm with the invoice/budget variance.

R400   Fiscal Budget-to-Invoice (All Assigned)	Other	Number of Units: 0.00 @ Rate: 0.00 ea. = <b>0.00</b> Adjustment: 0.00
<u>Matter is now at 53% of its combined budgets.</u>		

### R401 Invoice-to-Firm's Budget per Matter

### Legal Department Language

When this rule is engaged (box is checked), invoices that are submitted by a law firm will be measured against the budget that has been established for that firm on a given matter. *LAWTRAC* will notify the approver of the current status of a matter in relation to that firm's budget for that matter; be it 10% or 110%.

If no budget has been approved for the firm, the budgetary status of the matter will not be flagged for the approver's review.

### Legal Department View

 R401   Fiscal Budget-toInvoice (Firm) 0.00 Items @ 0.00 ea. Date Incurred: 02/20/11 <u>Matter is now at 27.3% of this firm's budget.</u>	0.00	
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------	---------------------------------------------------------------------------------------

### Outside Counsel Language

This invoice is being measured against the budget that has been established for your firm for a given matter. *LAWTRAC* will notify the in-house approver of the current status of a matter in relation to that budget; be it 10% or 110%.

### Outside Counsel View

OTHER NON-ADJUSTMENT FLAGS	
R401_Feb1c	 Budget Warning Timekeeper Code:   LEDES Code:   Line Item Date: 20110220

View when firm reviews the invoice, a line is added to the invoice to provide firm with the invoice/budget variance.

R401   Fiscal Budget-toInvoice (Firm)	Other	Number of Units: 0.00 @ Rate: 0.00 ea. = <b>0.00</b> Adjustment: 0.00
<u>Matter is now at 27.3% of this firm's budget.</u>		

## R402 Invoice-to-Fiscal Reserves per Matter

### Legal Department Language

This rule can be engaged to measure all invoices billed to a matter against fiscal year reserves set for that matter. *LAWTRAC* will flag the invoice to notify the approver of the matter's status in relation to the reserves set for that matter for a given fiscal year. If no reserves are set on a matter, no comparison can be made.

### Legal Department View



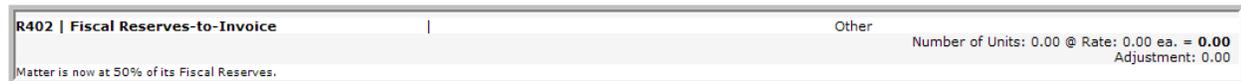
### Outside Counsel Language

This invoice is being measured against the reserve that has been established for your firm for a given matter. *LAWTRAC* will notify the in-house approver of the current status of a matter in relation to that reserve; be it 10% or 110%.

### Outside Counsel View



View when firm reviews the invoice, a line is added to the invoice to provide firm with the reserve status.



## Time and Date Check Rules (R500-R504)

### R500 Work within Invoice's FROM and TO dates

#### Legal Department Language

This rule will flag any line item dated for work performed prior to the invoice's FROM date. If outside counsel inadvertently forgets to bill for previous work performed and submits that time on subsequent invoices, those line items will be flagged for the approver's review. For example, if the FROM and TO dates of the invoice are 5/1 - 5/31 and one of the line items in the invoice is dated 3/12, that line item will get flagged for the approver's review.

If this rule is **not** engaged (box is unchecked), work performed prior to the FROM date will go through un-flagged.

## Legal Department View

 L200   Pre-Trial Pleadings and Motions Gabe Gamma 3.00 hrs. @ 115.00 per hr. Date Incurred: 03/12/10 Meeting re: pretrial meeting;	345.00 
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\*\*\*Click magnifying glass to see rule violation detail.

**RECORDED COMMENTS**

 -Rules Flag  
Work performed prior to the invoice FROM DATE.

## Outside Counsel Language

All lines on incoming invoices will be checked to ensure that the date of the line item falls within the invoice's START and END dates. Work performed prior to the invoice's START date will be flagged for the approver's review

## Outside Counsel View

**OTHER NON-ADJUSTMENT FLAGS**

R500_ON_Firm2_1-27	 <b>Work performed prior to the invoice START DATE.</b> Timekeeper Code: GG   LEDES Code: L200   Line Item Date: 20100312
--------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## R501 Ensure Invoices Reflect Fiscal Year Settings

### Legal Department Language

You can choose which date field should be used to properly set the Fiscal Year and Fiscal Quarter on a law firm's invoice. This rule should **always** be engaged; and you have four (4) options to choose from.

- Period FROM date
- Period TO date
- Invoice date
- Date Invoice is recorded

This adjustment setting should be performed early in your set-up process to ensure that budgets, reserves and rate cards all fall within the same Fiscal Year/Fiscal Quarter settings and contain the correct data.

Example: If **Period From Date** is selected and the FROM date on an invoice is dated 12/01/10 Lawtrac is going to look at the 2010 rate card to compare timekeeper rates even though the invoice date is 01/05/11.

If you do **not** engage this rule, *LAWTRAC* **will not** check incoming invoices against approved timekeeper rate cards.

## R502 Adjustment for Late Reporting

### Legal Department Language

By engaging this rule, you can set penalties for the reporting of work performed months prior to an invoice's submission. You can set four penalty amounts (by percentage) based

on the number of days between the actual line item date and the date the invoice is submitted (**not** the invoice date). The specific line will be flagged for the approver and the billed amount automatically adjusted downward to reflect the respective penalty.

### Legal Department View

L200   Pre-Trial Pleadings and Motions Ann Alpha 3.00 hrs. @ 100.00 per hr. Adjustment: -15.00 Date Incurred: 11/30/10 Meeting re: pretrial meeting;	285.00
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\*\*\*Click magnifying glass to see rule violation detail.

**RECORDED COMMENTS**

-Rules Flag  
Adjustment For Late Reporting

### Outside Counsel Language

The in-house legal department has set penalties for the reporting of work performed months prior to an invoice's submission. Based on the number of days between the actual line item date and the date the invoice is submitted, the specific line will be flagged for the approver and the billed amount automatically adjusted downward to reflect the respective penalty.

### Outside Counsel View

ADJUSTMENT/S RECORDED				
Invoice No.	COMMENT/S	SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
R502_feb3-crazy	Adjustment for Late Reporting <small>Timekeeper Code: aa   LEDES Code: L200   Line Item Date: 20101130</small>	300.00	285.00	-15.00

## R503 Inconsequential Event

### Legal Department Language

When this rule is engaged, *LAWTRAC* will add up all the time entered by each individual timekeeper recorded on an invoice. If the total time for any **one** timekeeper is 2% or less of the total time of **all other** timekeepers, then all the line items for that one timekeeper will be flagged for the approver's review. This could result in the possible exclusion of those fees.

### Legal Department View

L200   Pre-Trial Pleadings and Motions Gabe Gamma 10.00 hrs. @ 200.00 per hr. Adjustment: -850.00 Date Incurred: 01/28/10 Meeting re: pretrial meeting;	1,150.00
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\*\*\*Click magnifying glass to see rule violation detail.

02/17/11	Dale Delta 01/27/10 L230   Court Mandated Conferences receipt and consideration Plaintiff's supplemental responses which identify one Corpus Christi plaintiff; check alleged work history dates against ABC ownership;	Inconsequential Event, Less than 2% of all other timekeepers.
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### Outside Counsel Language

*LAWTRAC* will add up the total time entered for every timekeeper recorded on an invoice. If the total time for any **one** timekeeper is 2% or less of the total time of **all other** timekeepers, then all the line items for that one timekeeper will be flagged for the approver's review. This could result in the possible exclusion of those fees.

## Outside Counsel View

OTHER NON-ADJUSTMENT FLAGS	
R503_onematter_4line	 Inconsequential Event Timekeeper Code: dd   LEDES Code: L230   Line Item Date: 20100127

## R504 10+ Hours per Day – per Timekeeper – per Invoice (per Matter)

### Legal Department Language

By engaging this rule (box is checked), *LAWTRAC* will flag the line(s) within a single invoice of any timekeeper who has billed more than 10 hours for any one given day against the same matter. This rule helps you control the billing of overtime hours.

### Legal Department View

 L200   Pre-Trial Pleadings and Motions Ann Alpha 15.00 hrs. @ 200.00 per hr. Date Incurred: 01/28/10 Meeting re: pretrial meeting;	3,000.00 
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\*\*\*Click magnifying glass to see rule violation detail.

RECORDED COMMENTS
 -Rules Flag Timekeeper has billed more than 10 hours for any one given day on this invoice.

## Outside Counsel Language

*LAWTRAC* will add up the total hours recorded by an individual timekeeper for the same date, the same matter and submitted on the same invoice. If the total time billed exceeds 10 hours, those line(s) on the invoice will be flagged for the approver's review.

## Outside Counsel View

OTHER NON-ADJUSTMENT FLAGS	
R504_ON_Firm1_MB7	 Timekeeper has billed more than 10 hours for any one given day on this invoice. Timekeeper Code: AA   LEDES Code: L200   Line Item Date: 20100128

## Words and Phrases Rules (R600-R603)

### R600 Designate Specific Word(s) and/or Phrase(s) to Flag Non-Billable DISBURSEMENTS

#### Legal Department Language

This rule will only look at disbursement items in the invoice that contain specific words and/or phrases. If you decide you will not pay outside counsel for copies or local travel, you would enter "copies" and "local travel" into your processing rules. Any disbursement line that contains a word or phrase that you have designated will be flagged by *LAWTRAC* for the approver's review.

## Legal Department View

The below example, the specific word to search was "lunch".

A screenshot of a rule violation notification. The header shows 'E110 | Out-of-town Travel' with a red 'X' icon. Below it, it says '1.00 Items @ \$50.00 Date Incurred: 01/28/10' and 'Meeting re: pre-trial lunch meeting;'. On the right side, there is a yellow house icon and the amount '50.00' with a magnifying glass icon.

\*\*\*Click magnifying glass to see rule violation detail.

A screenshot of a 'RECORDED COMMENTS' box. It has a red 'X' icon and the text '-Rules Flag'. Below that, it says 'Contains a word(s) that has been identified as non-billable. (Lunch; Copies; Local Travel)'. The word 'Lunch;' is circled in blue.

## Outside Counsel View

Outside Counsel does not get notified of this rule violation.

## R601 Designate Specific Word(s) and/or Phrase(s) to Flag Non-Billable FEES

### Legal Department Language

This rule will only look at fee items within an invoice that contain specific words and/or phrases. For example, you can use this rule to flag invoices which contain the word "administrative" and/or the phrase "breakfast meeting". LAWTRAC will search for all fee lines where "administrative" and/or "breakfast meeting" is used and then flag each of those lines for the approver's review. This will help prevent outside counsel from billing for something that your billing guidelines have identified as "non-billable."

### Legal Department View

The below example, the specific phrase to search was "lunch meeting".

A screenshot of a rule violation notification. The header shows 'L150 | Budgeting' with a red 'X' icon. Below it, it says 'Ann Alpha 1.00 Item @ 200.00 per hr. Date Incurred: 03/28/10' and 'Meeting re: pre-trial lunch meeting;'. On the right side, there is a yellow house icon and the amount '200.00' with a magnifying glass icon.

\*\*\*Click magnifying glass to see rule violation detail.

A screenshot of a 'RECORDED COMMENTS' box. It has a red 'X' icon and the text '-Rules Flag'. Below that, it says 'Contains a word(s) that has been identified as non-billable. (lunch meeting; administrative; out of town travel;)'. The phrase 'lunch meeting;' is circled in blue.

## Outside Counsel Language

Outside Counsel does not get notified of this rule violation.

## R602 Designate Specific Word(s) and/or Phrase(s) to AUTOMATICALLY REMOVE Non-Billable Disbursements

### Legal Department Language

This rule will only look at disbursement items on the invoice that contain specific words and/or phrases. If you decide you will **not** pay outside counsel for office supplies or mileage, then enter "office supplies" and "mileage" into your processing rules. LAWTRAC will negate the dollar amount of any disbursement line that contains word(s) and/or phrase(s) that you have designated, bringing the dollar amount of that line to \$0.00.

Unlike rule R600 where the line is simply flagged for the approver, this rule disallows the total amount of the violating line.

### Legal Department View

The below example, the specific word to search was "lunch".

\*\*\*Click magnifying glass to see rule violation detail.

### Outside Counsel Language

In-house has designated one or more disbursement LEDES codes as non-billable. If an identified code is submitted on an invoice, Lawtrac will negate the charge, bringing the line amount to \$0.00.

### Outside Counsel View

ADJUSTMENT/S RECORDED				
Invoice No.	COMMENT/S	SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
R602_LUNCH	<b>X Contains a disbursement that has been identified by in-house as non-billable.</b> Timekeeper Code:   LEDES Code: E110   Line Item Date: 20100128	50.00	0.00	-50.00

## R603 Designate Specific Word(s) and/or Phrase(s) to AUTOMATICALLY REMOVE Non-Billable Fees

### Legal Department Language

This rule will only look at the fees in the invoice that contain specific words and/or phrases. For example, if you decide you will **not** pay outside counsel for clerical work and local travel time, you could enter "clerical" and "local travel" into your processing rules. LAWTRAC will disallow the dollar amount of any line where fee items contain a word and/or phrase that you have designated, bringing the dollar amount of that line to \$0.00. Unlike rule R601 where the line is simply flagged for the approver, this rule disallows the total amount of the violating line.

### Legal Department View

The below example, the specific phrase to search was "lunch meeting".

\*\*\*Click magnifying glass to see rule violation detail.

## Outside Counsel Language

In-house has designated one or more LEDES task codes as non-billable. If an identified code is submitted on an invoice, Lawtrac will negate the charge, bringing the line amount to \$0.00.

## Outside Counsel View

ADJUSTMENT/S RECORDED				
Invoice No.	COMMENT/S	SUBMITTED AMT	ADJUSTED TO	ADJUSTED AMT
R603_Feb7	 Contains a fee that has been identified by in-house as non-billable. <small>Timekeeper Code: AA   LEDES Code: L150   Line Item Date: 20100328</small>	200.00	0.00	-200.00

### 4. Verify LEDES codes

Location: [Administration](#) | [Finance](#) | [LEDES Codes](#)

The Uniform Task-Based Management System is the system that defines the codes used in e-billing. All standard codes should exist in the database. The system allows you to add any custom codes such as mileage, color copies, \*negotiated rates, discounts, etc.

*\*Negotiated Rates example: If your department negotiated a flat fee for the life of a specific matter you can set up a separate LEDES code to capture that rate.*

*\*Mileage Rate example: If your department negotiated a fee of \$0.30 per mile you can set up a separate LEDES code to capture that rate.*

Please note these non-LEDES-standard codes will be designated with an asterisk in the LEDES Codes table.

If a firm attempts to submit an invoice with a code that is not listed in your LEDES Codes table, then the invoice will not be accepted.

Scroll down below the list of standard task codes and input the custom code.

- ✓ Type in the custom code
- ✓ Type in the Description
- ✓ Select the Type from the drop-down menu. (See below example.)

CODE	DESCRIPTION	TYPE	
E125	Mileage	Disbursement	Save

You are brought to the below screen. Here you can edit the name of the code by typing in the "Description" box. You can also get to this screen by clicking on the task code itself.

E125*	← Mileage
-------	-----------

There are 4 areas to the Edit LEDES Code Use screen:

- 1. Edit a Custom Code:** Click on the task code (E125) and type in a new description.

- 2. Restrict or Require a Task Code:** You can RESTRICT a task code or you can REQUIRE a task code on invoices.

Click in one of the boxes either RESTRICT or REQUIRE (cannot check both).

Activate Rule 204 for RESTRICTING a task code or Rule 205 for REQUIRING a task code:

To activate this rule, you must turn on the rule found under Advanced Processing Rules:

- ✓ Administration
- ✓ Finance
- ✓ LEDES Processing Rules
- ✓ Advanced Processing Rules
- ✓ Rate Card Checking
- ✓ Click box to the left of R204 or R205
- ✓ Click **Save Code Settings**

- 3. Set a Maximum Allowed Per Invoice on a Task Code:** You can set a maximum allowed by inputting a total count or total amount in the boxes provided.

Maximum Allowed Per Invoice

0 count ea. 500.00 total amount

To activate this rule, you must turn on the rule found under Advanced Processing Rules:

- ✓ Administration
- ✓ Finance
- ✓ LEDES Processing Rules
- ✓ Advanced Processing Rules
- ✓ Rate Card Checking
- ✓ Click box to the left of R201
- ✓ Click **Save Code Settings**

- 4. Set a Maximum Allowed Per Fiscal Year on a Task Code:** You can set a maximum allowed per fiscal year by inputting a total count or total amount in the boxes provided.

Maximum Allowed Per Fiscal Year  
Per Outside Counsel

2000 count ea. 0 total amount

This rule also falls under the one listed above...R201.

## 5. Update Legal Dept Matter Assignments

If an invoice is submitted against a matter record where the assigned Primary is an **inactive** Dept. Member, or where a Primary has not been assigned, the approval notification message cannot be addressed. This can interfere with the invoice approval process.

To verify all matters have a Lead/Primary assigned you can view the "Missing Primary" Morning Report.

If you do not have "Missing Primary" as one of your Morning Reports go to:

- ✓ Administration
- ✓ Reports
- ✓ Morning Report Setup
- ✓ Click the box to the left of "Missing Primary"

You can view a Primary/Leads matters assignments by going to:

- ✓ People
- ✓ Select
- ✓ Click on the  link to review the current matters assigned to Paul Brown as the Lead/Primary.



A list of open matter assignments will display.

RECORDS Yellow Rows Indicate New Records (past 10 days)				OPEN RECORDS
MATTER	MATTER NAME	MATTER TYPE	KEYWORD	ASSIGNED
BL-000195	Retest 2 of Substitution (Admin / Legal Dept)	Project	Investigation	10/07/09

## 6. Update Firm/Vendor Matter Assignments

If the Firm is not assigned to a matter record, they will not be able to view the record or submit invoices against it.

To verify all matters have outside counsel assigned you can view the “No Outside Counsel Assigned” Morning Report. If you do not have this report as one of your Morning Reports go to:

- ✓ Administration
- ✓ Reports
- ✓ Morning Report Setup
- ✓ Click the box to the left of “No Outside Counsel Assigned”.

You can also view a list of matters to which a firm is assigned by going to:

- ✓ People
- ✓ Firms
- ✓ Select Firm
- ✓ Navigate to the “Matter-Lead Role” tab and “Matter-Support Role” tab. This screen lists the matters the firm is assigned to **and** the matters that have been closed in the last 90 days.



Click the “People” tab to view a list of the firm’s employees and the number of matters to which each is assigned. Employees who are assigned to matters will have tabs listing their assigned matters.

EMPLOYEES / ASSOCIATES		
<a href="#">Daggett, Attorney</a>	Acquisitions	6 Matters*
<a href="#">Doe, Johnny</a>	Acquisitions	4 Matters*
<a href="#">Jones, Johnny</a>	Acquisitions	3 Matters*
<a href="#">Knight, Michael E.</a>	Acquisitions	2 Matters*
<a href="#">Lockridge, Gayle</a>	Acquisitions	0 Matters*
<a href="#">Lockridge, Gayle3</a>	Real Estate	0 Matters*
<a href="#">Olson, Maureen</a>	Acquisitions	4 Matters*
<a href="#">Turner, Art E.</a>	Acquisitions	1 Matters*

**7. Advise firms and select Legal Dept recipient for training notifications.**

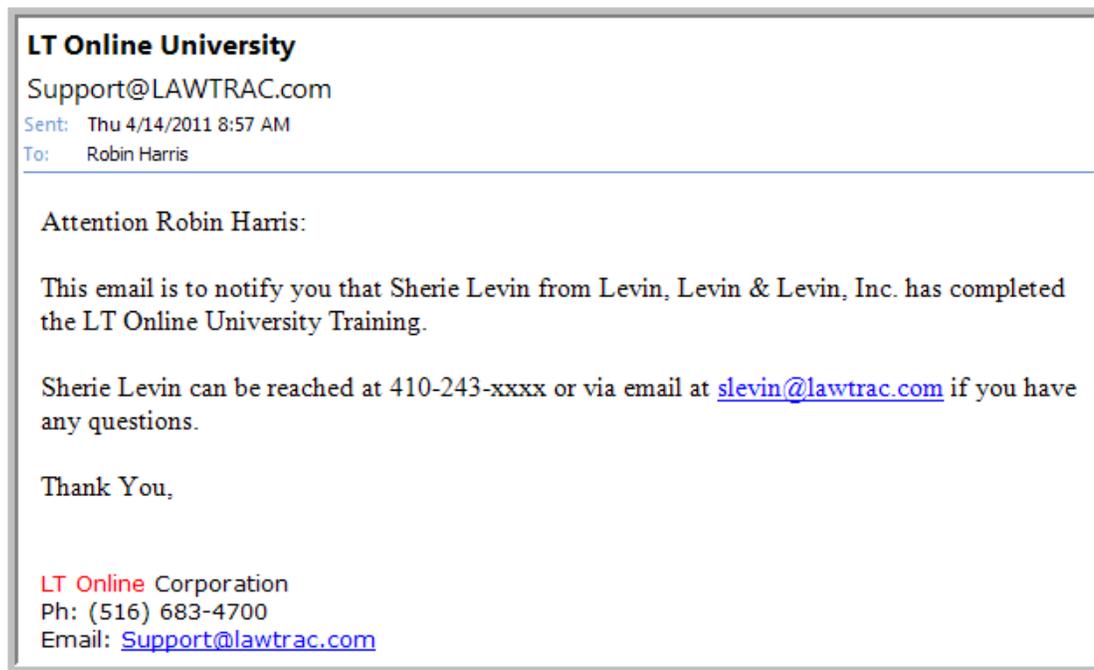
Send announcement letter to law firms notifying them invoices need to be sent electronically. Provide the firm with the date of when you would like them to begin electronic invoicing. You will want to give them at least one month notice so they can complete the training and also make any changes on their end such as notifying their timekeepers to begin using use the standard UTBMS (task) codes.

Once you know who will be the law firm Administrator you will want to input their information on the law firm’s profile screen. Also, make sure the green button next to eBilling is marked. You will need to click [Edit this Record](#) in order to turn the dial green for this field. You can run a report based on this field by going to:

- ✓ Reports
- ✓ Standard Report
- ✓ Click “Firms that perform eBilling” ([LFV020.cfm](#))

The screenshot shows the 'FIRM INFORMATION' page for 'Regis Law Firm'. At the top, there are tabs for 'Information', 'People', 'Matter - Lead Role', 'Matter - Support Role', 'Classifications', and 'Activity'. Below these are more tabs: 'Budgets', 'Invoices', 'Variance', 'Rate Card', 'Hours Recorded', 'Calendar', 'Documents', 'Represents', and 'Search'. The main content area shows the firm's address: '1068 Brayden St. Paul MN 51106 United States'. To the right, a green box highlights the 'Primary / Billing Contact' information: 'Kelly Jones', 'Voice: 218-345-2944 Ext: 546', and 'Email: [KJones@regis.com](mailto:KJones@regis.com)'. Below this, it says 'No Additional Addresses on File [ Edit ]'. Further down, there are fields for 'Time Keeper ID', 'Client No', 'Currency: United States (USD)', 'TeamID: VEN5187', 'Federal ID', 'GL No: 111111', and 'LAWTRAC Certification:'. At the bottom, there are several status indicators: 'Recommended: ●', 'eBilling: ●' (highlighted in green with a red arrow), 'Minority: ●', and 'Approved: ●'. An 'Option' label is also present.

Once the law firm completes the training you and anyone else you designate will receive a completion notice from [Support@Lawtrac.com](mailto:Support@Lawtrac.com). Please provide [Support@Lawtrac.com](mailto:Support@Lawtrac.com) with the email addresses of the individual(s) who should receive the training completion notices.



After you receive the training completion notice you will want to provide the law firm with the following:

- ✓ URL to the Lawtrac site
- ✓ User name and password
- ✓ Email address (The Administrator is asked to verify the password with their email address so you want to make sure their email address is listed under the "Primary/Billing Contact" section on the law firm record.)
- ✓ Lawtrac User Guide for Firms & Vendors v3.4
- ✓ Expense (Disbursement) Upload File
- ✓ Sample LEDES Invoice

## 8. **Rate Card Approval**

Location: [Administration](#) | [Firms & Vendors](#) | [Rate Card Activities](#)

Rate Card Approvers are selected individuals in the legal department that have the authority to approve law firm hourly rates. Rate Card Approvers must approve the law firm's timekeeper rates in order for the law firm to submit invoices. The Rate Card Approver must have Administration rights and at least \$1 approval authority. You will

want to select a Primary and Secondary approver just in case the Primary is unavailable to approve rates. To select who the rate cards approvers will be go to:

- ✓ Administration
- ✓ Firms & Vendors
- ✓ Rate Card Activities
- ✓ Set Approvers

**RATE CARD ACTIVITIES** Set Approvers

Primary Authority:  Secondary Authority:  Save Close

When a Law Firm submits new timekeeper rates or updates existing rates, the Rate Card Approvers are notified through the internal LTO messages and given a link to access the Rate Card Activities Screen where they can see the rate cards for that particular firm. You can also access the Rate Card Activities Screen by clicking on Law Firm (left side menu) and click Rate Card Requests.

Rate Card Activity Lane Resorte Lawfirm: Sent 07/12/10

Subject: Rate Card Activity

Message: A change has been made to the rate card for Payton Paralegal of Lane Resorte Lawfirm for 2010. Please view this item as soon as possible. If you decide to turn down any request for rate change it is requested you contact the outside counsel or company directly as LAWTRAC will not send an automatic message. A copy of this notification is also being sent to the secondary rate card approver for Top Button Shirts, Inc..

Resorte Lawfirm Jay Adelson Administrator

**ACTIONS**

View Water	View Invoice	View Budget	View Calendar
<a href="#">Go To Rate Card Screen</a>			
View Routing Slip	Send Reply	Save As Unread	Delete Message

Send to email address:

**Law Firms**

[Look-Up](#)

[Roster](#)

[Invoicing Hours Review](#)

[United States Map](#)

[World Map](#)

[Add New Firm](#)

[Rate Card Requests](#)

You can view the submitted rate card(s) by clicking the link in the message or clicking the "Rate Card Requests" link under Law Firms.

**RATE CARD ACTIVITIES** Set Approv...

Lane Resorte Lawfirm (2011)

● Compare Invoices to Rate Card  
 ● One Rate Card Per Company  
 ● Compare Fee Items Only  
 ● Disbursement Items to Company Rate Card

**OPEN REQUESTS FOR APPROVAL** Rules Check: -OK Potential Problem | [Ignore Rules](#)

Timekeeper	Attwater, Tony	B100 [F]   Administration	225.00/hr		07/12/10	<input type="checkbox"/>
Timekeeper	Attwater, Tony	T110 [F]   Reverse Fee (record as negative)	100.00/hr		07/12/10	<input type="checkbox"/>
Timekeeper	Siefert, Sam	B100 [F]   Administration	101.00/hr		07/12/10	<input type="checkbox"/>

You can either click each box to the right of each line to approve it or scroll down to the bottom of the page and click "Check/Uncheck All" (left side of screen) and then click "Approve Checked" (right side of screen).

**Edit a Rate Card:**

Location: [Law Firm](#) | [Look Up](#)

- ✓ Law Firms (left menu)
- ✓ Look Up
- ✓ Select law firm
- ✓ Click the [Rate Card](#) tab if you want to edit the Company Rate Card or if you want to edit a timekeeper's rate card then click People, select timekeeper, and click the Rate Card tab.
- ✓ Scroll down and click "[Edit This Rate Card](#)"
- ✓ The below screen gives you the ability to edit the dollar amount per task code. Input the new amount in the box and click Save. *Rate Cards created or edited by in-house are automatically approved.*

E100 Expenses	500.00	●	Save
E101 Copying	0.10	●	Save
E102 Outside Printing	500.00	●	Save
E103 Word Processing	500.00	●	Save

**Adjustments to a Rate Card:**

Location: [Law Firm](#) | [Look Up](#)

- ✓ Law Firms (left menu)
- ✓ Look Up
- ✓ Select law firm
- ✓ Click the [Rate Card](#) tab if you want to edit the Company Rate Card or if you want to edit a timekeeper's rate card then click People, select timekeeper, and click the Rate Card tab.
- ✓ Scroll down and click "[Edit This Rate Card](#)"

**QUICK ADJUSTMENTS**

- Restrict This Rate Card To Fee Items Only.
- Restrict This Rate Card To Disbursement/Other Items Only.
- Change All Approved Rates On This Rate Card To
- Remove Unapproved Rates From This Rate Card

- Restrict This Rate Card to Fee Items Only. Checking this box will remove any task code other than Fee task codes from the specific timekeeper's rate card (for example expense task codes).
- Restrict This Rate Card to Disbursement/Other Items Only. Checking this box will remove any task code other than Expense task codes from this timekeeper's rate card (for example, Fee task codes...B100, C100, L100, etc.).
- Change All Approved Rates on This Rate Card to. If a timekeeper's rate has been changed, the legal department can change all approved task codes to the new rate.

The change will appear when the law firm reviews the rate card. A message is not automatically sent to the law firm.

- Remove Unapproved Rates from this Rate Card. Checking this box will remove the unapproved rates. For example, if a law firm input expense task codes on a timekeeper's rate card, you can remove them if you did not approve them. *\*\*If you did approve the rates you can first select "Restrict this Rate Card to Fee Items Only" and that will unapprove the Expense task codes ...then you can select "Remove Unapproved Rates from this Rate Card"*.

### **Add a Specific Code to a Rate Card:**

Location: [Law Firm](#) | [Look Up](#)

This feature allows the legal department to add a task code and rate to a timekeeper's rate card.

- ✓ Law Firms (left menu)
- ✓ Look Up
- ✓ Select law firm
- ✓ Click the Rate Card tab if you want to edit the Company Rate Card or if you want to edit a timekeeper's rate card then click People, select timekeeper, and click the Rate Card tab.
- ✓ Scroll down and click "Edit This Rate Card"

The screenshot shows a web form titled "SPECIFIC CODE". It contains a dropdown menu labeled "Code:" with the selected value "B110 | Case Administration". Below the dropdown is a text input field labeled "Amount:". At the bottom of the form is a "Save" button.

### **Delete a Rate Card:**

Location: [Administration](#) | [Firms & Vendors](#) | [Rate Card Activities](#) | [Delete a Rate Card](#)

This feature allows the legal department to completely delete a timekeeper's rate card.

You need to select the following:

- ✓ Firm
- ✓ Year - Provides a drop-down of the years that contain rate cards.
- ✓ Individual - Provides a list of timekeepers that have rates in that given year.

You can either delete individual task codes by clicking the trash or delete all the task codes by clicking "[HERE](#)".

Code	Rate	Date	Approved	DEL
B100	300.00	03/22/11	●	🗑️
B110	300.00	03/22/11	●	🗑️
B120	300.00	03/22/11	●	🗑️
B130	300.00	03/22/11	●	🗑️
B140	300.00	03/22/11	●	🗑️
B150	300.00	03/22/11	●	🗑️
B160	300.00	03/22/11	●	🗑️
B170	300.00	03/22/11	●	🗑️
B180	300.00	03/22/11	●	🗑️

**Duplicate a Rate Card:**

Location: [Administration](#) | [Firms & Vendors](#) | [Rate Card Activities](#) | [Delete a Rate Card](#)

This feature allows the legal department to duplicate an entire *approved* rate card from one year to the next.

You need to select the following:

- ✓ Firm
- ✓ Year - Provides a drop-down of the years that contain rate cards.

- ✓ Individual - Provides a list of timekeepers that have approved rates in that given year. You can also select "All Timekeepers" which will allow you to duplicate all timekeeper rates as well as the Company Rate Card at one time.
- ✓ Fiscal Year: type in the year you want the rates copied to.

**DUPLICATE A RATE CARD**

Select Firm: Regis Law Firm

Select Year: 2010

Select Rate Card: Vanessa Forcelli

**You can select by: Individual or All Timekeepers which includes the Company Rate Card**

Choose:

1. Firm
2. Year
3. Individual

Once you have those items selected you will be able to duplicate the entire rate card.

Only approved rates can be duplicated.

Duplicate rate cards will appear as 'approved'. The effective date will be today.

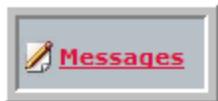
DUPLICATING: Set For Fiscal Year: 2011

Code		Rate
L100	Case Assessment, Development and Administration	125.00
L110	Fact Investigation/Development	125.00
L120	Analysis/Strategy	125.00
L130	Expert/Consultants	125.00
L140	Document/File Management	125.00

## 9. Invoice Approval

Invoices must be approved by the Legal Dept. The invoice approval chain is based on the responsible attorney (Primary Contact) assigned to the matter. LTO compares the matter total on the invoice to the authorization level of the Primary. If the invoice amount exceeds the Primary's authorization amount, then more than one approver will appear on the approval chain. Approvers are notified through the internal LTO messages and given a link to the invoice. The invoice approval chain is listed on the invoice, with hyperlinks for each approver that go to a screen where the approver can approve or reject the invoice.

In the examples below, Robin Harris, the Primary on an invoiced matter has received an internal "New Invoice To Review/Approve" message.



The "Messages" link on the main menu will turn red to indicate the message.

You can also use [Invoices | Pending Approval](#) link to access invoices awaiting your approval or [Invoices | View Invoices](#) to access the Most Recent Unapproved Invoices.

**Message Center** Robin Harris

Delete Checked Messages:

**UNREAD MESSAGES**

SUBJECT	SENT BY	DATE
<a href="#">New Invoice To Review / Approve</a>	RH Law Firm	04/24/07

Clicking the link to the message displays the message details and a "View Invoice" link.



To view the invoice, click the “ View Invoice” link. You can also view your unapproved invoices by clicking on Invoices and Pending Approval.



All Mind Pending screen displays all invoices I have not yet approved.

INVOICE	FIRM / VENDOR	MATTER	DATE	HAND-OFF	AMOUNT
<input type="checkbox"/> <u>Sept 9 TEST</u>	Test Law Firm II	Test-001	03/01/10	Final Approver	3,402.50 
<input type="checkbox"/> <u>Test A</u>	Test Law Firm II	Test-001	03/01/10	Final Approver	2,802.50 



Click invoice number (TEST A). The next screen displays the details of the invoice.

Sept\_9\_TEST 3,402.50

**DETAILS OF INVOICE NUMBER Sept\_9\_TEST**

Test Law Firm II Phone:  
Federal ID:  
GL No:  
Client No:

AL Print

United States Home

Invoice Date	FY/QTR	Recorded	From	To	Approved	To Acct.	Paid
03/01/10	2010 / 2	09/23/10	01/28/10	01/27/10			
Total:							<b>3,402.50</b>

[About](#)

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HRC Reference No. Electronic File Type  
LEDES File Transfer

LEDES File Name  
VEN39328877944.txt

Classification: Single-Matter Detailed Invoice

**CLICK ON MATTER No. TO VIEW INFORMATION**

<a href="#">Test-001</a>	TEST - Tillmer, Dan vs. ABC Company, Inc.	Robin Harris	3,402.50
--------------------------	-------------------------------------------	--------------	----------

**Test-001 TEST - Tillmer, Dan vs. ABC Company, Inc.**

Approval Chain		Original - United States Dollars	Current
1. Robin Harris	✓	Fees 3,402.50	Fees 3,402.50
2. LAWTRAC Training	✓	Disbursements 0.00	Disbursements 0.00
		Other 0.00	Other 0.00
		<b>3,402.50</b>	<b>3,402.50</b>

[Add Tax / VAT](#)

User Definable 1:  User Definable 2:  User Definable 3:

**56 RECORDS** [Show Comments](#)

<b>L210   Pleadings</b> John Unger 0.50 hrs. @ 175.00 per hr. Date Incurred: 01/28/10	87.50	<a href="#">P</a>
<b>L320   Document Production</b>	140.00	<a href="#">P</a>

## Different Ways to View Invoice:

**Approval Chain**

1. Robin Harris Not Yet Reviewed

2. LAWTRAC Training Approve | Reject | Worksheet

[Adjust Approval Chain](#)

Documents Charge Backs

Comments / Discussion Invoice History

View Detail Items

★ [Order Received Default](#) ★ [Chronological Order](#)

Time Keeper Totals LEDES Code Review

User Definable 1:  User Definable 2:  User Definable 3:

❖ **Order Received** – this is the order it uploaded into LAWTRAC. No specific order.

11 RECORDS		<a href="#">Show Comments</a>
<b>L100   Case Assessment, Development and Administration</b> Ronald Bates 5.00 hrs. @ 100.00 per hr. Date Incurred: 05/01/10	500.00	<a href="#">P</a>
<b>L220   Preliminary Injunctions/Provisional Remedies</b> Jane Johnson 4.00 hrs. @ 300.00 per hr. Date Incurred: 05/01/10	1,200.00	<a href="#">P</a>
<b>L390   Other Discovery</b> Jane Johnson 6.00 hrs. @ 300.00 per hr. Date Incurred: 05/01/10	1,800.00	<a href="#">P</a>
<b>L110   Fact Investigation/Development</b> Mike Doe 3.00 hrs. @ 200.00 per hr. Date Incurred: 05/03/10	600.00	<a href="#">P</a>
<b>L200   Pre-Trial Pleadings and Motions</b> Ronald Bates 2.00 hrs. @ 200.00 per hr. Date Incurred: 05/08/10	400.00	<a href="#">P</a>
<b>L200   Pre-Trial Pleadings and Motions</b> Mike Doe 3.00 hrs. @ 200.00 per hr. Date Incurred: 05/11/10	600.00	<a href="#">P</a>
<b>L210   Pleadings</b> Jane Johnson 1.00 hrs. @ 300.00 per hr. Date Incurred: 05/31/10	300.00	<a href="#">P</a>
<b>L130   Expert/Consultants</b> Jane Johnson 1.00 hrs. @ 300.00 per hr. Date Incurred: 05/15/10	300.00	<a href="#">P</a>
<b>L130   Expert/Consultants</b> Ronald Bates 2.00 hrs. @ 100.00 per hr. Date Incurred: 05/02/10	200.00	<a href="#">P</a>
<b>L210   Pleadings</b> Jane Johnson 1.00 hrs. @ 300.00 per hr. Date Incurred: 05/11/10	300.00	<a href="#">P</a>
<b>L110   Fact Investigation/Development</b> Ronald Bates 1.00 hrs. @ 100.00 per hr. Date Incurred: 05/31/10	100.00	<a href="#">P</a>

❖ **Timekeeper Totals** – sorted by time keeper.

- If a day is highlighted in blue that indicates the time keeper worked on a weekend.
- If a day is highlighted in red that indicates the time keeper worked over 10 hours on that day.

HOURS BY DAY / BY TIMEKEEPER								Click on Hours To View Details
	May 01	May 02	May 03	May 08	May 11	May 15	May 31	
Ronald Bates	5	2	—	2	—	—	1	
Mike Doe	—	—	3	—	3	—	—	
Jane Johnson	10	—	—	—	1	1	1	
<b>Total Time:</b>	15	2	3	2	4	1	2	

Details by timekeeper: Click on a timekeeper (Ronald Bates) and the details for that timekeeper will appear in date order.

HOURS BY DAY / BY TIMEKEEPER								Click on Hours To View Details
	May 01	May 02	May 03	May 08	May 11	May 15	May 31	
Ronald Bates	5	2	—	2	—	—	1	
Other Matters:	—	—	—	—	—	—	—	
• May 01	L100   Case Assessment, Development and Administration •Case Assessment: Reviewed documentation sent by OC.					5.00		<a href="#">🔗</a>
• May 02	L130   Expert/Consultants •Reviewed expert notes.					2.00		<a href="#">🔗</a>
• May 08	L200   Pre-Trial Pleadings and Motions •Drafted pleadings.					2.00		<a href="#">🔗</a>
• May 31	L110   Fact Investigation/Development •Reviewing fact investigation documents.					1.00		<a href="#">🔗</a>
Mike Doe	—	—	3	—	3	—	—	
Jane Johnson	10	—	—	—	1	1	1	
<b>Total Time:</b>	15	2	3	2	4	1	2	

❖ **Chronological Order**

7 DATES ON INVOICE - Fee Items Only Listed				
<b>May 01, 2010</b> <i>Saturday</i> <span style="float: right;"><b>15.00 hrs.</b></span>				
Ronald Bates	L100   Case Assessment, Development a	Case Assessment: Reviewed documentation sent by OC.	5.00 hrs.	500.00 <a href="#">🔗</a>
Jane Johnson	L220   Preliminary Injunctions/Provisi	Preliminary Injunctions...review documentation.	4.00 hrs.	1,200.00 <a href="#">🔗</a>
Jane Johnson	L390   Other Discovery	Discovery: OC sent additional documentation to review for discovery.	6.00 hrs.	1,800.00 <a href="#">🔗</a>
<b>May 02, 2010</b> <i>Sunday</i> <span style="float: right;"><b>2.00 hrs.</b></span>				
Ronald Bates	L130   Expert/Consultants	Reviewed expert notes.	2.00 hrs.	200.00 <a href="#">🔗</a>
<b>May 03, 2010</b> <i>Monday</i> <span style="float: right;"><b>3.00 hrs.</b></span>				
Mike Doe	L110   Fact Investigation/Development	Telephone call with QC to discuss investigation.	3.00 hrs.	600.00 <a href="#">🔗</a>

❖ **LEDES Code Review** – allows you to view the costs by LEDES codes.

7 RECORDS [Show Details](#)

To Drill Down - Click On LEDES Code

L100	Case Assessment, Development and Administration	1	500.00
L110	Fact Investigation/Development	2	700.00
L130	Expert/Consultants	2	500.00
L200	Pre-Trial Pleadings and Motions	2	1,000.00
L210	Pleadings	2	600.00
L220	Preliminary Injunctions/Provisional Remedies	1	1,200.00
L390	Other Discovery	1	1,800.00

**PHASE REVIEW** [Show History Across All Invoices Received](#)

⇓ Fee Items Only ⇓

<b>L100 Case Assessment, Development and Adminis</b>			<b>1,700.00</b>
» L100 Case Assessment, Developm	5.00 hrs	500.00	7.94 %
» L110 Fact Investigation/Develo	4.00 hrs	700.00	11.11 %
» L130 Expert/Consultants	3.00 hrs	500.00	7.94 %
<b>L200 Pre-Trial Pleadings and Motions</b>			<b>2,800.00</b>
» L200 Pre-Trial Pleadings and M	5.00 hrs	1,000.00	15.87 %
» L210 Pleadings	2.00 hrs	600.00	9.52 %
» L220 Preliminary Injunctions/Pr	4.00 hrs	1,200.00	19.05 %
<b>L300 Discovery</b>			<b>1,800.00</b>
» L390 Other Discovery	6.00 hrs	1,800.00	28.57 %

*Mouse Over Row To See LEDES Description*

### Flagging a line item

In any of the views (Order Received, Timekeeper Total, Chronological Order or LEDES Code Review) you have the ability to “flag” a line item. Flagging a line item allows you to make a comment while you are in the review phase. To flag an item, look for the  next to the dollar amount. Let’s say you are in the Chronological view reviewing each line and decide you want to reduce the amount on a specific line. Click  and a screen will appear that identifies you flagged this line.

<b>May 01, 2010</b>	Saturday		<b>15.00 hrs.</b>	
Ronald Bates	L100   Case Assessment, Development a	5.00 hrs.	500.00	
	Case Assessment: Reviewed documentation sent by OC.			

You can input a ‘Comment’ to take a certain action such as reduce the amount by a certain dollar amount. This is only an internal comment law firm staff will not see this comment. Now that you have flagged this item, made a comment and saved the comment you can close the window to move onto another line item.

*Note, if you need to close out of LAWTRAC for any reason the flags/comments that you made are saved and the invoice will continue to be in your “Pending Approval” link until you are ready to approve it.*

**L310 | Written Discovery** [F]  
**John Berman**  
 Date Incurred: 01/27/10 [Set Flag](#)

review and necessary consideration of Plaintiff Robison's Responses to Master Discovery;

Time:	0.80
Rate:	125.00
Adjustment:	0.00
<b>100.00</b>	

**Approval Chain**

1.	Robin Harris
2.	LAWTRAC Training

**RECORDED COMMENTS**  
 None Recorded  
 Record A Comment

Reduce by 50.00.

## Worksheet

Now you have reviewed each line and made comments you are ready to make the line item adjustments.

- Scroll back to your name and to the right you will see the word "Worksheet".

**Approval Chain**

1.	Robin Harris	✓	Not Yet Reviewed
2.	LAWTRAC Training		

- Click Worksheet. Here you can click "View Flagged Items" to look only at the items you flagged.

**Approval Chain**

1.	Robin Harris	✓	Not Yet Reviewed
2.	LAWTRAC Training		

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**Approval Mode**

[View Flagged Items](#) [View All Items](#)  
[Close Worksheet](#)

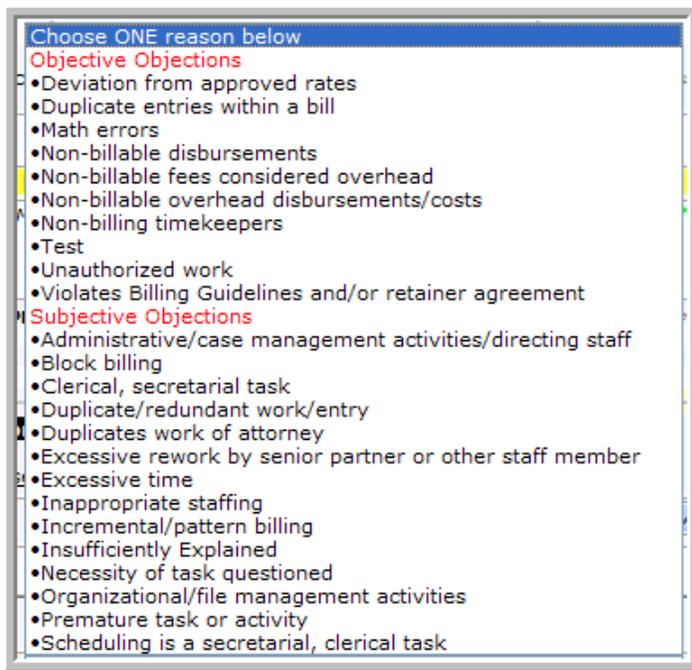
- This screen allows you to input the dollar adjustment. Note, the comment I made when I flagged it..."Reduce by 50.00."

**L310 [F] Written Discovery** John Berman Date Of: 03/01/10

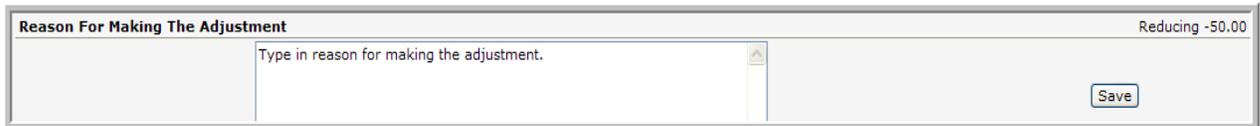
	Hours 0.80	Rate 125.00	Adjustment 0.00	review and necessary consideration of Plaintiff Robison's Responses to Master Discovery;	
	<b>100.00</b>			1. LAWTRAC Training: Reduce by 50.00	<b>OPTIONS</b> Adjust <input type="text" value="-50.00"/> <input type="button" value="Save"/> <input type="button" value="Reject"/>
	United States Dollars 100.00 Exchange Rate: 1.0000			<a href="#">View Other Comments &amp; Details</a>	

- Input the adjustment amount (-50.00) and click Save.

- The next screen allows you to select a reason for making an adjustment/rejection. Outside counsel will see which reason the approver selected.

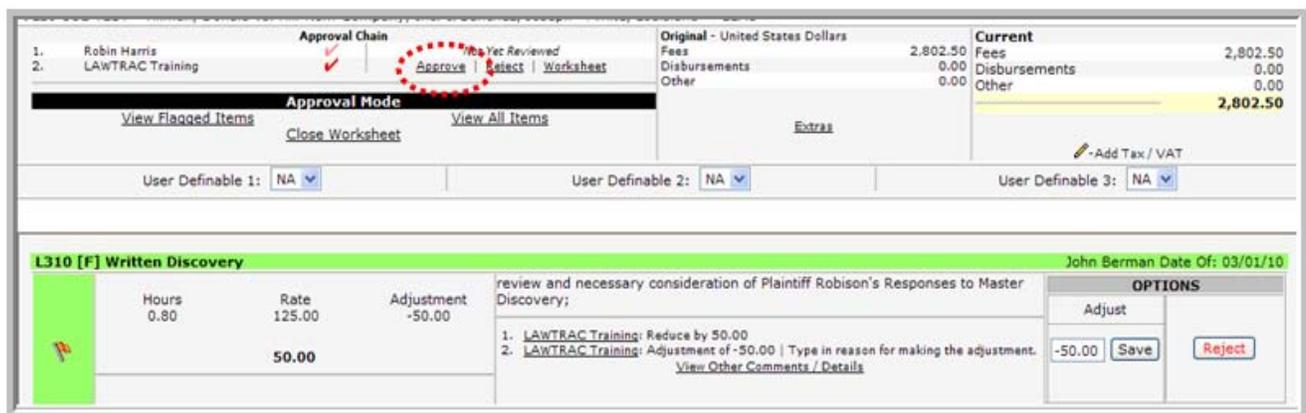


- You also have the ability to input a comment. This comment will be seen by the law firm.



## Approve

If you determined the invoice is good to approve you can scroll to the Approval Chain area and click Approve.



Once you click Approve a second screen displays with "Approve Invoice" to confirm you are finished and want to approve. Click Approve Invoice. Now, you are finished with the invoice and it has been sent to the next approver.



When you click "Approve Invoice" this Windows box will appear it is notifying you to not move from this screen until the approval steps are finished.



## Reject

If you want to Reject the entire invoice...click Reject.



The next screen allows you to input a reason for the rejection which the law firm will see the data you type in the "Reason for Rejection" box. This screen also makes you verify that you want to delete the invoice by clicking "Yes", however, if you decided not to reject the invoice you can select "No".

You also have the ability to delete the invoice from Lawtrac by clicking in the box to the left of "Delete this Invoice (no recovery)".

Select "Yes" and click **Reject Invoice**. Now, you are finished with this invoice and the firm has been notified that you rejected this invoice.

