Create a Staffing List

CounselLink gives you the ability to select the individuals that will be creating billable hours for a specific matter. The list of individuals assigned to work on a specific matter is called a staffing list. When this list is submitted to a corporate client, they will have the ability to approve the legal team assigned to their cases. Most clients require that each matter's staffing list be approved by them prior to invoicing.

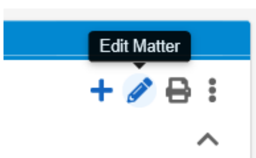
Before creating a staffing list, information about the staff should have already been input into CounselLink during the registration process as part of the Add Timekeepers step.

After completing the steps below, your client will approve or reject billers according to their needs. If an invoice is created for a matter that requires an approved staffing list, and one is not in place, the user will be unable to submit an invoice for that matter.

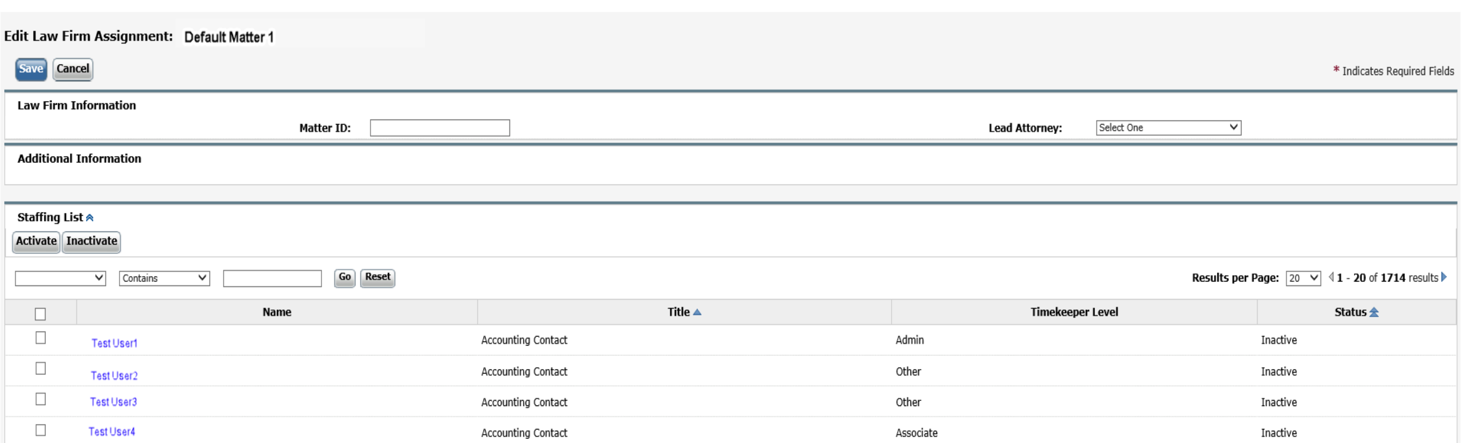
If you have any questions as to why a specific biller was approved or rejected by your client, please direct any communication directly to your client contact.

Step-By-Step:

- In CounselLink, click on the **Matters** tab to search for a matter
- Click the **Matter Title** for the matter to be reviewed
    - The **Matter Overview** page appears.
- Click the **Edit Matter** button to add staff on the matter.



- The names of the staff members will list at the bottom under **Staffing List**.
    - If their current status is "Inactive", check the box next to their name and click **Activate**.
    - If there are many pages of names, click Activate for each page. To activate everyone at once, check the top box. Repeat the process to inactivate any staff.



- To send the staffing list to your client for approval, click the **Request Approval** button. This button will appear after you activate at least one timekeeper.
- Matter status will change to **Pending Resolution** on the Home page.

- The Staffing List must be approved by the Client before you can invoice.