

Appeals

Appeals are a normal part of billing and we strive to work with all firms to resolve any issues as quickly and efficiently as possible related to reductions to invoices.

Presently we have transitioned all of our appeal processing to Legal Exchange for electronically billed invoices. Appeals on any paper billed invoices should be addressed to LitMan Appeals e-mail box (details below). Legal Exchange appeals need to be made in one of two ways, depending on the nature of the items being appealed. Detail follow below.

- Appeals should be made when an auditor has reduced a billing line and explained the need to provide receipts or other documentation related to the activity, a pdf. copy of the documentation should be attached to the appeal following the appropriate process below.
- Appeals can also be made if providing additional information about the activity might justified the original billing
- Appeals should also be made if our payment is not correct. Occasionally payment processing can be delayed beyond our control, so there may be times when a quick-pay discount, should be returned, or a cost share or rate applied is incorrect, as examples.

All electronically billed invoices, must be appealed through Legal Exchange as follows:

Legal eXchange – Law Firm Invoice Appeals

Overview


The Appeals module allows law firms to dispute adjustments from within the Legal eXchange application.

- Invoices must be approved before an appeal can start. Liberty Mutual Helmsman Management Services LLC (hereinafter “HMS” or “Helmsman”) requires you do not begin to submit an appeal until you have received payment for the original invoice. Use of the Appeal Functionality in Legal Exchange before payment will delay receipt of the initial payment.
- Invoices must be appealed within 45 days after the payment for the original invoice is received.
- Only line items that have been adjusted can be appealed and only up to the adjustment amount.
- An appeal of any invoice level adjustments should be made by submitting a new invoice in Legal Exchange. This should be done using the original invoice number followed by "-Appeal" (*Example: original invoice number: 1452. Your new invoice number should be 1452-Appeal*). This process should also be followed for any invoices with a combination of invoice and line item level issues. An example of an invoice level appeal would be the appeal of a cost-share percentage reduction.
- An appeal reason must be entered for every line item being appealed

Steps to Appeal an Invoice:

1. Log into Legal eXchange.
2. Click the Invoices tab (**OR** if you know the invoice number, type that into the Invoice Quick Search on the Home tab and skip to Step 4).
3. In the View drop down (located on the right side of the page) select Adjusted by Client.
4. Click on the invoice you wish to appeal.
5. Each invoice displays the Final Approval Date and the Appeal Allowed Until date. Verify that the Appeal Allowed Until date has not yet passed. Click on the Appeal Button to launch the Adjusted Line Items Dialog.

Status: OPEN **Next Step:** PAYMENT

Invoice Date: 09/05/2010  [Print Version](#)

Bill Date (Start,End): 04/30/2010, 08/30/2010

Rec'd by Client: 01/28/2011

Final Approved Date: 02/01/2011

Appeal Allowed Until: 07/31/2011

Invoice Number: 3

Invoice Totals			
	Original	Adjstmt	To Pay
Fees	\$4,638.00	\$4,638.00	\$0.00
Expenses	\$1,666.28	\$0.00	\$1,666.28
Total (\$)	\$6,304.28	\$4,638.00	\$1,666.28

Matter Name: Joe Johnson-BT TEST
Client Matter ID: 2151512
Law Firm Matter ID:
Claim Number(s):

Invoice Description:
Services Rendered

6. Select the adjusted line item(s) that you would like to appeal by using the check boxes to the left of the LI#.

<input checked="" type="checkbox"/>	449	07/06/2010	South, Paul	L160	A103	Revise Release and Hold Harmless to meet Plaintiff objections	\$29.00	\$29.00	\$0.00
<input type="checkbox"/>	450	07/06/2010	South, Paul	L160	A107	Correspondence with adjuster regarding timing of release settlement check	\$29.00	\$29.00	\$0.00
<input type="checkbox"/>	451	07/06/2010	South, Paul	L160	A103	Draft Letter to plaintiff counsel regarding settlement check agreement as to release	\$29.00	\$29.00	\$0.00
<input checked="" type="checkbox"/>	452	07/06/2010	South, Paul	L160	A103	Draft Letter to plaintiff counsel regarding settlement check agreement as to release	\$29.00	\$29.00	\$0.00
<input type="checkbox"/>	453	07/09/2010	South, Paul	L160	A104	Review Plaintiff letter regarding release order of dismissal and execute same	\$14.50	\$14.50	\$0.00
<input checked="" type="checkbox"/>	454	07/16/2010	South, Paul	L160	A103	Letters to Claims Representative and insured client representative regarding Plaintiff execution of release and hold harmless	\$43.50	\$43.50	\$0.00
<input type="checkbox"/>	456	07/29/2010	South, Paul	L210	A104	Review court executed final order of dismissal	\$14.50	\$14.50	\$0.00
<input type="checkbox"/>	455	07/30/2010	Weston, Sarah	L140	A104	Review court executed final order of dismissal	\$29.00	\$29.00	\$0.00

7. Click on the Appeal button to create a draft invoice appeal. The invoice appeal will keep the original invoice number and include -A1 (Example: original invoice # 123 will be # 123-A1).

Invoice Header

Invoice #: 3-A1 (appeal of [Invoice #3](#) | [Orig Inv LI Listing](#))
Matter Id: 2151512
Invoice Description:
 Services Rendered

8. You will only be able to appeal what was adjusted. You will see the field that can be appealed represented by the text box..

Orig LI #	Date	Description	Orig Units	Curr Units	Orig Rate	Curr Rate	Orig Amt	Curr Amt
New LI #	Type	Code	Adj Units	Appeal Units	Adj Rate	Appeal Rate	Adj Amt	Appeal Amt
437	6/28/2010	Correspondence to plaintiff counsel regarding settlement check approval of releases	0.2000	0.0000	\$145.00	\$145.00	\$29.00	\$0.00
1	IF	L160	0.2000	0.0000	\$0.00	\$145.00	\$29.00	\$0.00

9. You cannot appeal more than the adjusted amount

a. If the hours were adjusted you can only appeal the hours on the line item.. For instance, if .3 hours were reduced you can appeal any number of hours up to .3.

Orig LI #	Date	Description	Orig Units	Curr Units	Orig Rate	Curr Rate	Orig Amt	Curr Amt
New LI #	Type	Code	Adj Units	Appeal Units	Adj Rate	Appeal Rate	Adj Amt	Appeal Amt
437	6/28/2010	Correspondence to plaintiff counsel regarding settlement check approval of releases	0.2000	0.0000	\$145.00	\$145.00	\$29.00	\$0.00
1	IF	L160	0.2000	0.0000	\$0.00	\$145.00	\$29.00	\$0.00

b. If the rate was adjusted, you can only appeal the rate on the line item.[insert screen shot with rate change]

c. If both the units and rate were adjusted, you can only appeal the line item amount (\$)....[insert screenshot]

10. Enter the Appeal Amount for each line item. The Appeal Amount is the additional amount your firm is asking to be reconsidered. Again, the appeal amount cannot exceed the Adjustment Amount. Enter the Appeal Reason for each line item. Select the appropriate option for the Appeal Reason drop down menu, and then provide additional information in the free form text field. Helmsman requires that you complete both items – select from the drop-down menu AND enter in additional information the open text field to be included for your appeal to be considered.

Orig LI #	Date	Description	Orig Units	Curr Units	Orig Rate	Curr Rate	Orig Amt	Curr Amt	Adj Reason List	Appeal Reason List
New LI #	Type	Code	Adj Units	Appeal Units	Adj Rate	Appeal Rate	Adj Amt	Appeal Amt	Adj Reason	Appeal Reason
437	6/28/2010	Correspondence to plaintiff counsel regarding settlement check approval of releases	0.2000	0.0000	\$145.00	\$145.00	\$29.00	\$0.00		Time was Reasonable
1	IF	L160	0.2000	.1	\$0.00	\$145.00	\$29.00	\$0.00	Line item adjusted due to untimely submission	Additional comments go here

11. Click the Save button at the top or bottom of the Line Item Listing to save appeal information.

Line Item Listing - Appealed Line Items

SAVE all changes prior to paging or changes will be lost.

Action: Pages: 1

<input type="checkbox"/>	Orig LI #	Date▲	Description	Orig Units	Curr Units	Orig Rate	Curr Rate	Orig Amt
	New LI #	Type	Code	Adj Units	Appeal Units	Adj Rate	Appeal Rate	Adj Amt

12. Click the Submit to Client button to finalize the invoice appeal and send to the client for review.

Inv

Invoice #: 3-A1 (appeal of [Invoice #3](#) | [Orig Inv LI Listing](#))

Matter Id: 2151512

When the Appealed Invoice has been reviewed by the client it will show up in your Approved By Client view. To view the appeal results, click the Invoice # then click on Line Item Listing.

Legal eXchange – Law Firm Invoice Manual Appeals for Invoice Level Appeals (example: cost share or quick pay appeals) or Region Approved Appeals

Overview

Appealing any invoice level adjustments should be done by submitting a “Manual” appeal invoice in Legal Exchange. This should be done using the original invoice number followed by "-Appeal".

This process must be used for appeals where the current Legal eXchange functionality isn't available such as:

- Invoice reductions you wish to appeal such as quick pay or cost share reductions taken. These are the type of reductions that are not taken at individual line item, rather they are a reduction take off the invoice as a whole (invoice level reductions) Please note: If you wish to appeal both invoice level dollars (such as quick pay or cost share amounts) in addition to line items (that are appealable by using the 'appeal' button functionality), you must appeal ALL the dollars using this "-appeal" process. In other words, all reductions appealed related to an original invoice must be done together.
- Secondary or Late (past 45 days) Appeals approved by Regional Management for which the 'Appeal' button is no longer available. Please note: these must be approved by Regional Management prior to submitting this appeal in Legal eXchange

PLEASE NOTE: For any Secondary or Late Appeals approved by Regional Management must include confirmation of this approval when submitting the invoice. This is best achieved attaching a copy of the approval email exchange with regional management to the manual invoice as documentation.

Steps to Create Manual (-Appeal) Appeal Invoice:

13. Log into Legal eXchange.
14. Click the Invoices tab

15. Click Create Invoice
16. Invoice # entered must be Original Invoice # followed by “-Appeal”

For example: If Original Invoice is 135622. New invoice must be given # 135622-Appeal

Invoice #:	135622-Appeal
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17. All manually created appeal invoices must be made only for the dollars you are appealing and line items should be appealed only for the dollars you are appealing and at Pre Cost Share amounts. See Example 1 & 2 below.
18. Line Item Description for Invoice Level Reduction Appeals must have a separate line item for fees and a separate line item for expenses (1 line item entry for each). **The Task Code for these must be M100 for both the fee line item and expense line item. (shown below).**

Example 1: Appealing Cost Share:

- Original Invoice Total Amount: \$800 fees + \$200 expenses = \$1000
- Helmsman took a 50% Cost Share and paid law firm **\$400 fees + \$100 expenses** = \$500
- Law Firm believes Cost Share taken in error and is appealing the \$400 and \$100 cost share reductions

The Line Item Entries will look like this: Must be shown as 1 Unit at \$amount appealed

Line Item (LI) 1 for appeal of \$400 Fee related cost share reduction

Line Item Detail																									
<p>Line Item Date: 12/01/2011</p> <p>Line Item Type: Fee</p> <p>Timekeeper: TA</p> <p>Line Item Description: Cost Share of 50% FEES taken in error - no CS on this matter</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4" style="text-align: center; font-weight: bold;">Units * Unit Cost + Discount = Total</td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">*</td> <td style="text-align: center;">400</td> <td style="text-align: center;">+</td> <td style="text-align: center;">=</td> </tr> <tr> <td colspan="5">Task Code: M100</td> </tr> <tr> <td colspan="5">Activity Code:</td> </tr> <tr> <td colspan="5">Expense Code:</td> </tr> </table>	Units * Unit Cost + Discount = Total				1	*	400	+	=	Task Code: M100					Activity Code:					Expense Code:				
Units * Unit Cost + Discount = Total																									
1	*	400	+	=																					
Task Code: M100																									
Activity Code:																									
Expense Code:																									

Line Item (LI) 2 for appeal of \$100 Expense related cost share reduction

Line Item Detail																									
<p>Line Item Date: 12/01/2011</p> <p>Line Item Type: Expense</p> <p>Timekeeper: TA</p> <p>Line Item Description: Cost Share of 50% EXPENSE taken in error - no CS on this matter</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4" style="text-align: center; font-weight: bold;">Units * Unit Cost + Discount = Total</td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">*</td> <td style="text-align: center;">100</td> <td style="text-align: center;">+</td> <td style="text-align: center;">=</td> </tr> <tr> <td colspan="5">Task Code:</td> </tr> <tr> <td colspan="5">Activity Code:</td> </tr> <tr> <td colspan="5">Expense Code: M100</td> </tr> </table>	Units * Unit Cost + Discount = Total				1	*	100	+	=	Task Code:					Activity Code:					Expense Code: M100				
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1	*	100	+	=																					
Task Code:																									
Activity Code:																									
Expense Code: M100																									

19. If you wish to appeal both invoice level dollars (such as quick pay or cost share amounts) in addition to line items (that are appealable by using the ‘appeal’ button functionality), you must appeal ALL the dollars using this process. In other words, all reductions appealed related to an original invoice must be done together. See screenshot of Example 2 below for both cost share appeal and individual line item appeals on one invoice.
20. Line Item Description for individual line item appeals must start with “Appeal: *and your appeal reason*” followed by “Orig LI: *note the original line item*”.

See Example 2 screenshot below which illustrates this follow example of how to appeal individual line item reductions:
“Appeal: Depo time included 45 minutes of waiting for client who was late. Orig LI: 6”

Please note: line items should be appealed only for the dollars you are appealing and at Pre Cost Share amounts

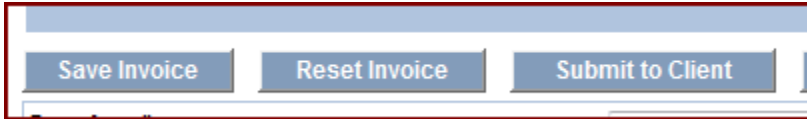
Example 2: Appealing Cost Share in addition to individual line item reductions taken on original invoice

- Cost Share line items will be outlined same as in Example 1 (shown below also)

- Individual line Item reductions should be entered at only \$ amount being appealed and at pre – cost share amount (If Cost Share exists, Helmsman will apply appropriate cost share when responding to appeal)

Alerts	Line	Date	Type	Task	Exp	Act	Unit Cost	Units	Discount	Total	Description	Timekeeper ID	TK Name
<input type="checkbox"/>	1	12/1/2011	F	M100			400.0000	1.0000	0.0000	400.0000	Cost Share of 50% FEES taken in error - no CS on this matter	TA	Tim Allen
<input type="checkbox"/>	2	12/1/2011	D		M100		100.0000	1.0000	0.0000	100.0000	Cost Share of 50% EXPENSE taken in error - no CS on this matter	TA	Tim Allen
<input type="checkbox"/>	3	12/3/2011	F	L110		A101	150.0000	0.7500	0.0000	112.5000	Appeal: Depo time included 45 minutes of waiting for client who was late. Orig LI: 6	TA	Tim Allen
<input type="checkbox"/>	4	12/5/2011	D		E105		139.0000	1.0000	0.0000	139.0000	Appeal: Hotel was 2 nights due to bad weather/flights cancelled. Orig LI: 9	TA	Tim Allen

21. Save Invoice and Click the “Submit to Client” button to submit appeal invoice to Helmsman.



FAQ

1. Once the original invoice is in ‘Payment’ status, the appeal button is available for me. Why can’t I just submit an appeal using this functionality?

The “Appeal” button only has the functionality to allow you to submit your appeal for line item reductions taken on the original invoice. If that is all you plan to appeal, then use the appeal button. If, in addition, you want to appeal invoice level reductions such as cost share or invoice level Quick Pay or Volume Discounts, then all appeals resulting from the original invoice must be made in the same way using the –Appeal manually submitted invoice outlined in these instructions.

2. Does the 45 day time limit apply to the manually submitted invoices as well?

Yes. You must submit the manually submitted –Appeal invoice within 45 days of receipt of your check.

3. Cost Share was taken incorrectly on the original invoice and we are appealing the incorrectly taken amounts. We also have line item reductions taken (time/unit reductions) at the incorrect cost share. Should we appeal these amounts at full amount less what we believe the correct amount should be?

No – always submit your appeal line items at Pre Cost Share (or Pre Discount) amounts for both Units and Rates. Helmsman during review of the appeal will apply the appropriate cost share or discount to the appeal invoice.

4. How do I know how much of the reduction from my invoice was due to Cost Share v Line Item Reductions


Currently you have a view that notes the total dollar adjustment (including cost share or discounts and line item reductions) and the Cost Share amounts outlined. This view has not changed. To view individual line items you can click on the ‘Print Version’ hyperlink which will give you line item adjustments and adjustment reasons.

Invoice Totals			
	Original	Adjstmt	To Pay
Fees	\$1,260.00	\$427.50	\$832.50
Expenses	\$210.00	\$52.50	\$157.50
Total	\$1,470.00	\$480.00	\$990.00
Adjustment History			
Date	Value	Reason	
12/18/2011	75.00%	447 - 2U-Cost share applied	

We are transitioning to an updated way of applying cost shares. Future invoices will show the following view for the same invoice with the 75% cost share applied. In this view – the first “Adjstmt” column outlines the line item adjustments and the Cost Share Adj column outlines cost share only. To view the % cost share applied, click on the “This invoice is cost shared” hyperlink on the top/left. As before, you can click the ‘Print Version” hyperlink to see line item adjustments and adjustment reasons.

Status: OPEN **Next Step:** CLIENT APPROVAL

[This invoice is cost shared](#)

 [Print Version](#)

Invoice Totals					
	Original	Adjstmt	Current	Cost Share Adj	To Pay
Fees	\$1,260.00	\$150.00	\$1,110.00	\$277.50	\$832.50
Expenses	\$210.00	\$0.00	\$210.00	\$52.50	\$157.50
Total	\$1,470.00	\$150.00	\$1,320.00	\$330.00	\$990.00

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Clicking the “This invoice is cost shared” hyperlink will give you the following pop up window:

Cost Share			
Start Date	End Date	% Share	Applies To
11/01/2010	11/30/2010	75.0000%	Line Item Date

[Close](#)

Appeals of invoices submitted on paper should be e-mailed to:

- litmanappeals@libertymutual.com within 45 days from date of payment. Requests for consideration shall include the firm name, address, claim number, invoice number and date, dates of service, and description of the issue. Any requested documents should be attached as Pdf. copies to this e-mail. The firm must provide sufficient detail to allow reviewers to accurately access the activity. A bill appeal specialist at the appropriate CLBU will, upon due consideration, issue a written decision.
- Appeals submitted after 45 days from the date of payment may not be considered.
- Repeated appeals, resulting from insufficient information in the original billing, where this requirement is clearly outlined in these Guidelines, may not be considered.
- An appeal from the decision of the bill appeal specialist may be taken, within 30 days of receipt of the decision, to the Regional Management offices of Enterprise Legal Services.