LexisNexis® CounselLink®

CounselLink

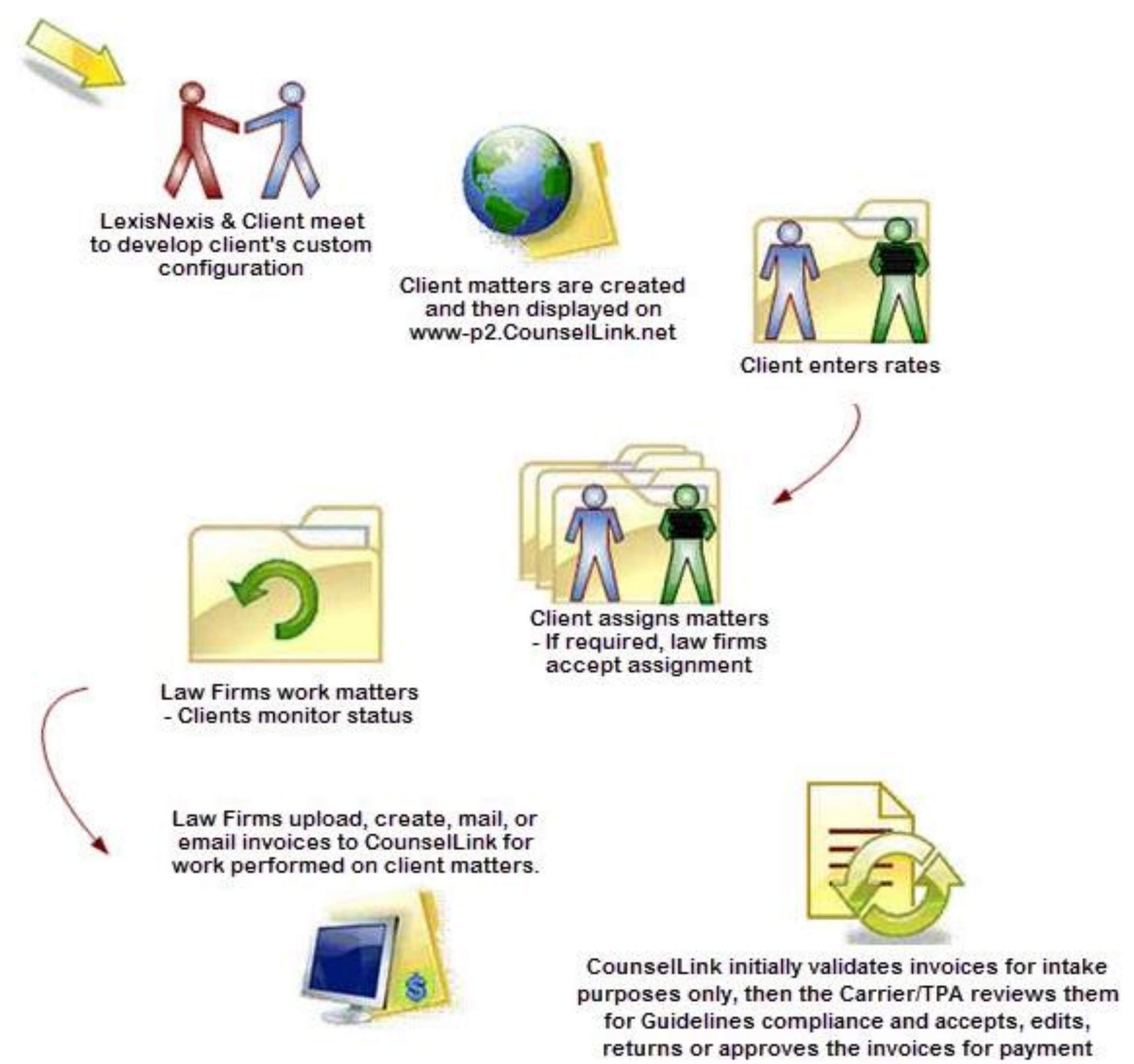
Registration Guide for New and Already Registered Firms For Liberty Mutual's Surety Firms

» For Private Law Firms and Other Surety Providers (Non-Registry)

Contents (Click link to go to that section)

CounselLink Process: At-a-Glance

For the law firm user, the basic functions of CounselLink are shown below.



Already Registered?

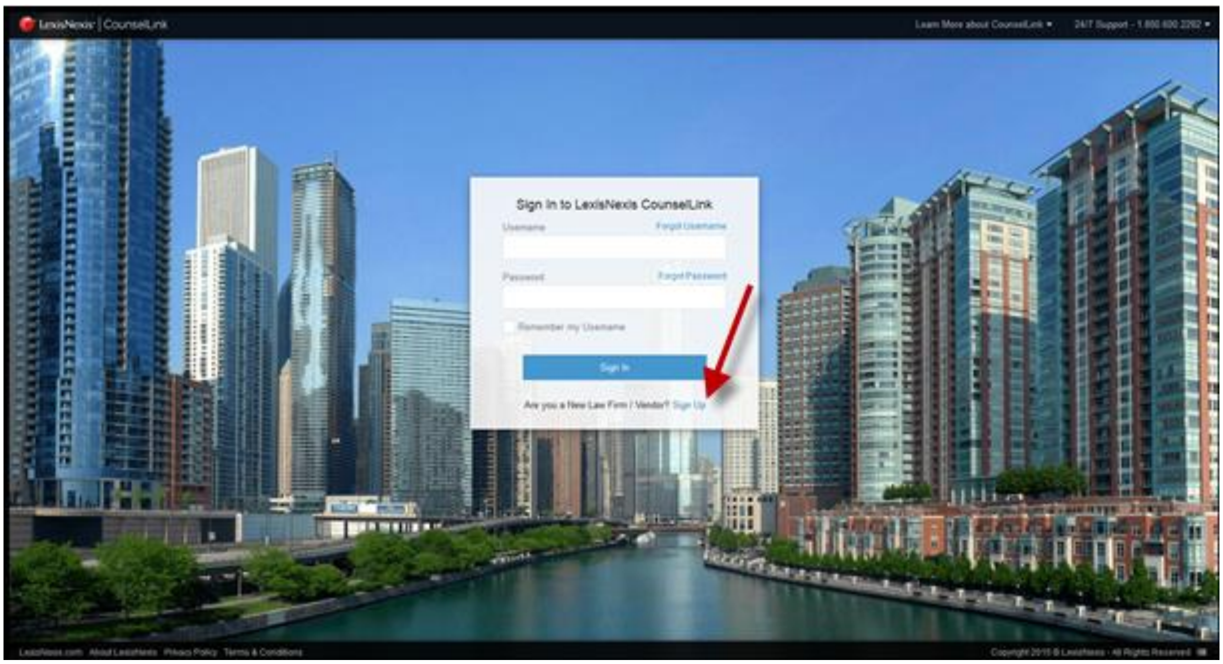
Please note that CounselLink has multiple websites. It is important that for this client you log on to https://www-p2.counsellink.net. Don't forget to bookmark this website for easy future access.

If you already have a CounselLink account it is not necessary to re-register. Please log on to your existing account and skip to the **Add Timekeepers** section.

(Note: If you have forgotten your user name and password, click the applicable 'Forgot Username' **or** 'Forgot Password' **link and CounselLink will email instructions to assist you.**

New Registration

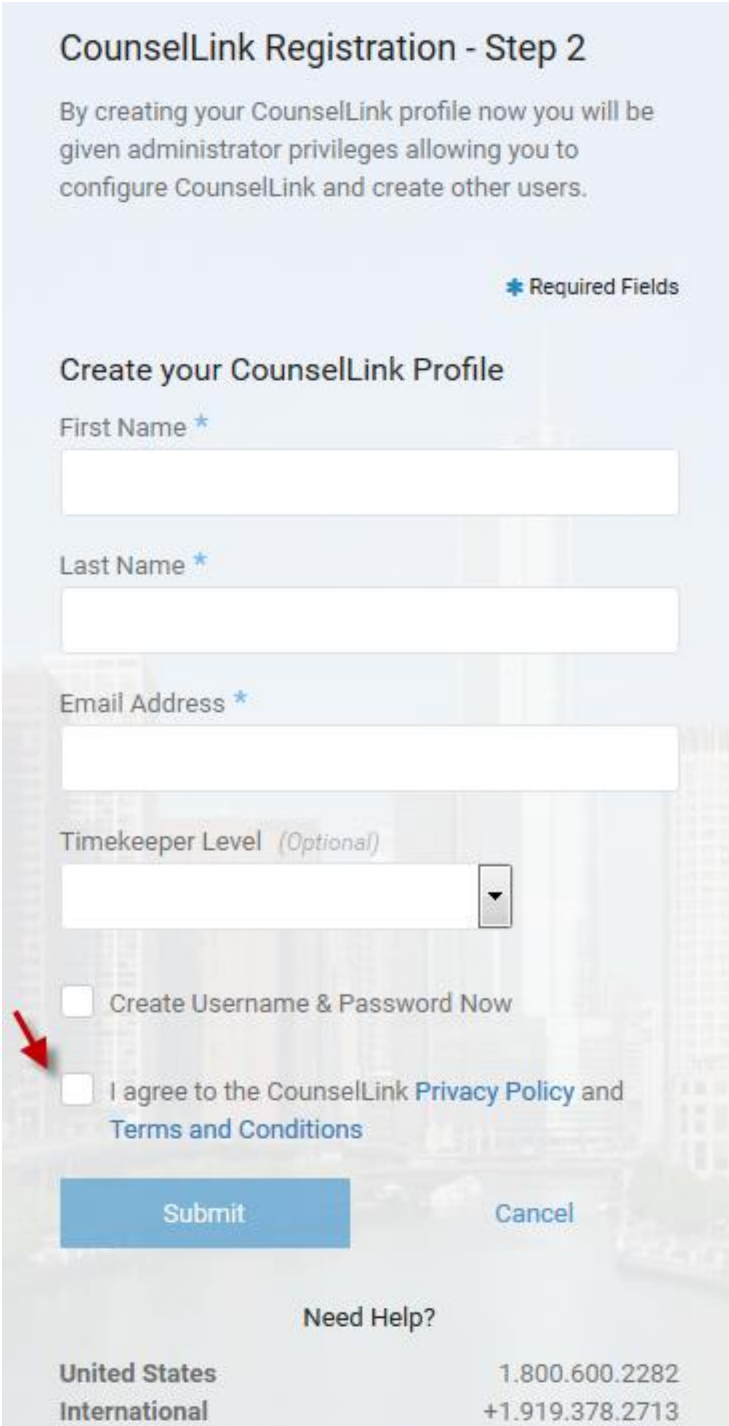
If you have not been notified that you an account has been created for you, you will need to register. To begin the registration process, go to https://www-p2.counsellink.net**,** click the **'Sign Up'** link – Step 1 screen.



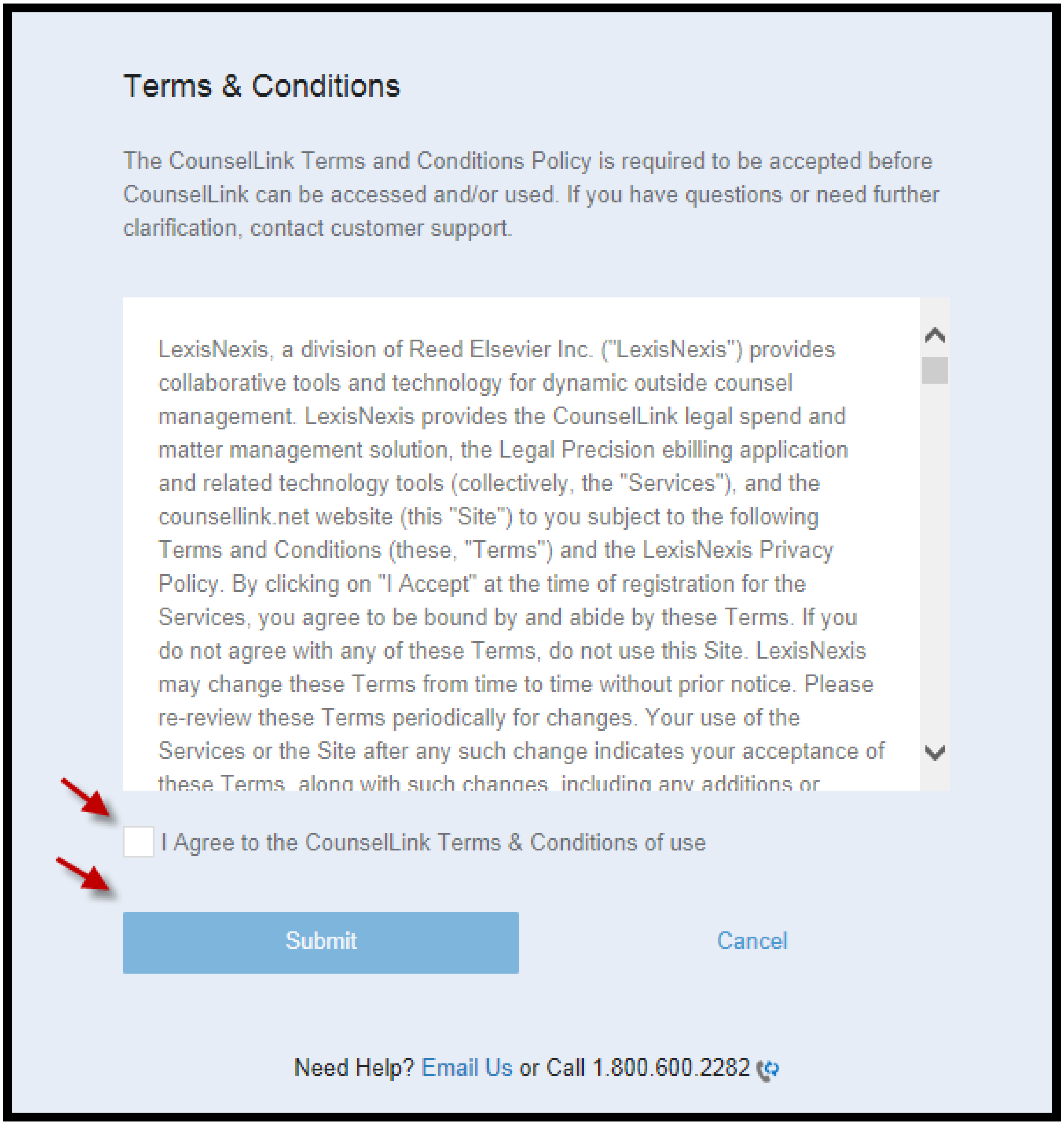
CounselLink Registration – Step 2: Create yourself as the administrator. With this role you are able to add timekeepers, enter rates and other administrative tasks.

Click the box next to **'Create your Username and Password now'** box to immediately create your credentials, or you may opt to have CounselLink email you a system generated Username and a link to create a password at a later time.

Don't forget to make note of the **'Secret Question'** and answer you select, as this is used as a secondary confirmation. When prompted you must select the same question and enter the same answer. Example: If you selected 'What is your favorite city?' and you answered 'paris', you will need to enter paris with a small p when prompted.



The first time you log on to CounselLink the Terms & Conditions will display. Please review, click **'I Agree to the CounselLink Terms & Conditions of use'** box and click the Submit button. You will now be on the CounselLink HOME page.



Screen shots using a sample law firm and fee structure have been used in the following pages for demonstration purposes.

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(LMO) Office Profile

A separate **Liberty Mutual Office (LMO)** must be created. If you have an existing office with timekeepers listed for other clients, **retain this office**.

If it hasn't already been done for you, you must create a new and separate Liberty Mutual office with **(LMO)** to the end of the name. (Example: Jones Law Firm, Atlanta (LMO)).

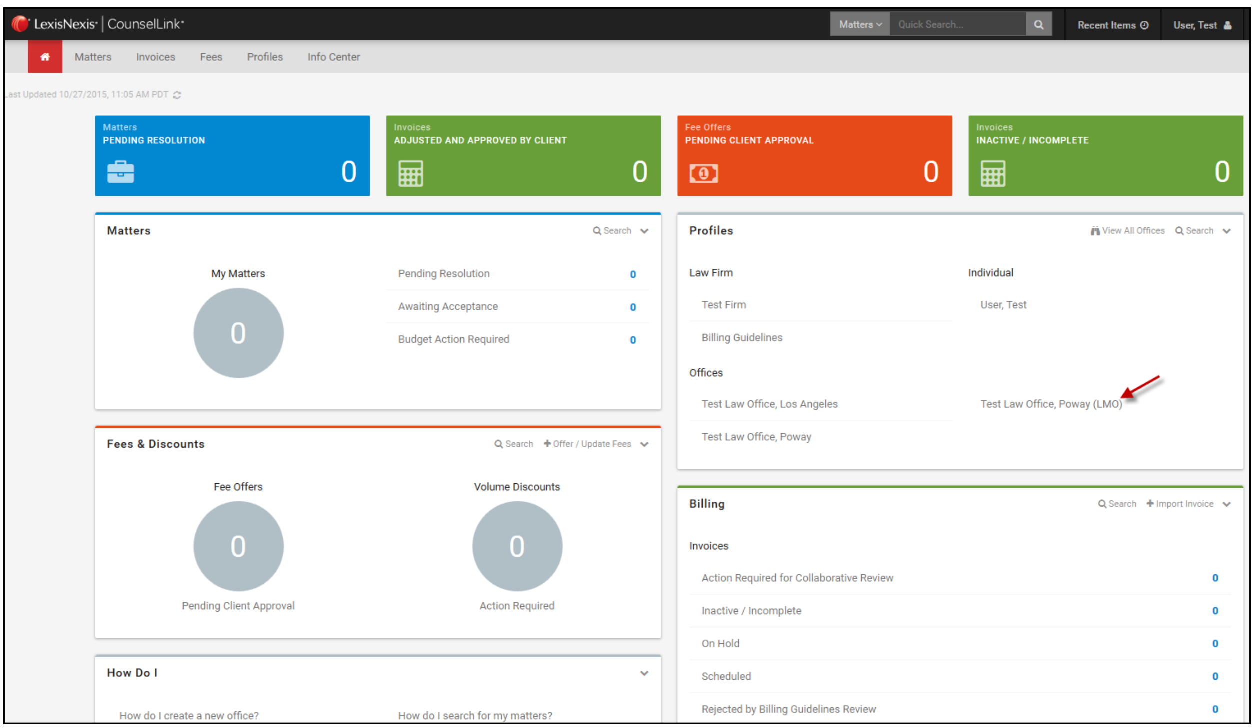
Next, all Liberty Mutual timekeepers must be created under this separate office.

Add (LMO) Timekeepers

The term **'Timekeeper'** or **'User'** includes the billing staff, as well as anyone who does billable work for a client. These titles include but are not limited to attorneys, paralegals, legal assistants, Consultants, etc.

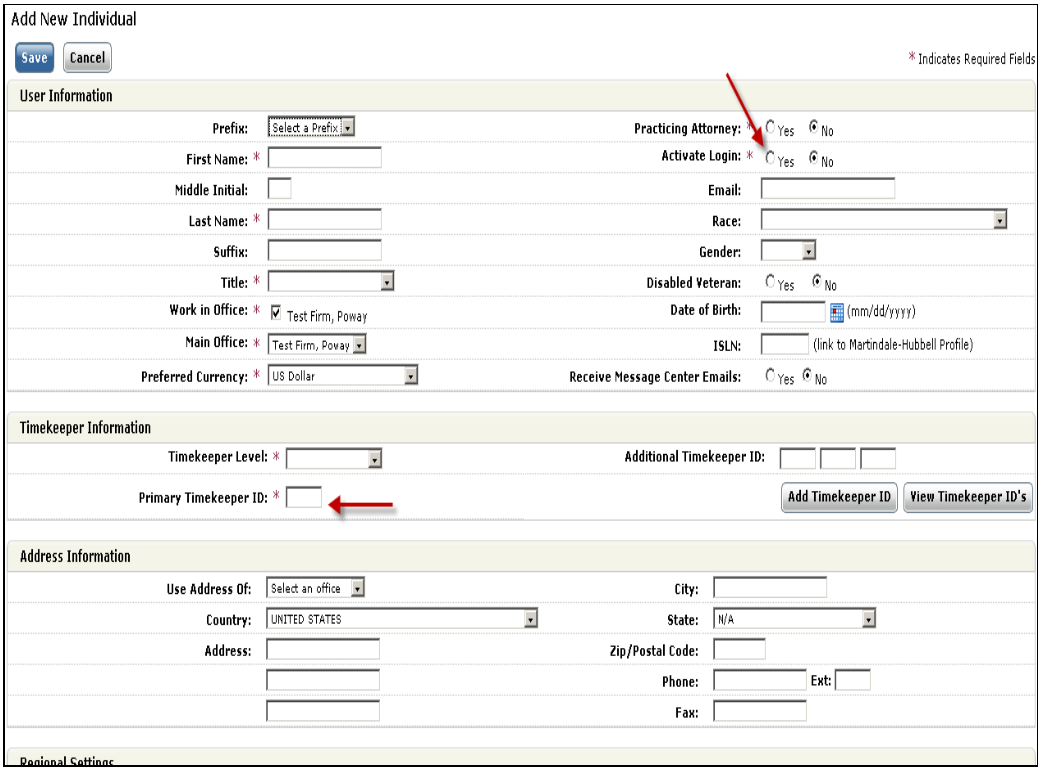
To add a timekeeper, click the link under **Offices.**

- Note: For **Liberty Mutual / Surety**, select the office with the **(LMO)** designation at the end of the name.



Go to the fourth section titled **'Office Staff'** and click **'Add User'**

Complete all fields that have the red *



Note:

- In addition to the user's '**Title**', they will also need a '**Timekeeper Level**'. The 'Timekeeper Level' must be a Liberty Mutual approved level for whom the individual will be providing services. See below for the approved Liberty Mutual timekeeper levels. Users can be entered more than once on your profile if custom timekeeper levels are required or if they will be billing under different 'Timekeeper Levels'.

Liberty Mutual has a specific set of 'Timekeeper Levels' which they will accept on their invoice submissions. In some instances, the timekeeper levels are the same as CounselLink's standard Timekeeper Level and others are used for Liberty Mutual implementation only. If you are currently using CounselLink, it is important for you to make note of the acceptable Timekeeper Levels. The list below contains the acceptable Liberty Mutual Timekeeper Levels:

Junior Associate	Paralegal
Junior Partner	Senior Associate
Law Clerk	Senior Partner

The ***blue*** text above indicates Liberty Mutual's custom Timekeeper Levels and the ***black*** text represent standard levels within CounselLink.

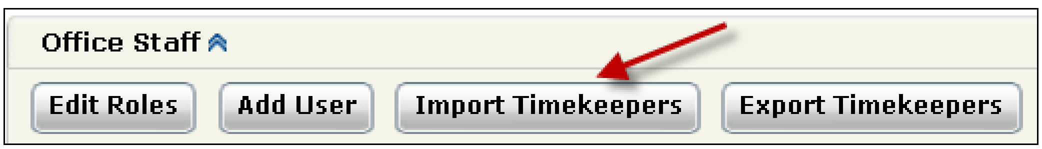
For Liberty Mutual/Surety Accounting, Consulting, Engineering or Non-Legal Vendors, select timekeeper level 'OTHER' only.

Adding Timekeepers to Your "(LMO)" Office

- 'Primary Timekeeper ID' must match the identifier used on your invoices for this biller. The ID can be numbers, letters or the combination of both
- Practicing Attorney - If biller is an attorney, change 'Practicing Attorney' to YES, otherwise leave default setting
- Activate Login – change to YES only if this individual will need to login to CounselLink. Most timekeepers do not need access. If the default remains NO, it is not necessary to enter an email address
- Some clients require the Race, Gender and Disability fields be completed. Please refer to your registration request email to determine if your client requires these fields.
- Click 'Save'
- If biller is an attorney, a 'Roles' screen will display, leave default settings and click 'Save'
- Return to Law Office screen, click 'Add User' and repeat until all timekeepers that bill client are entered

To Import multiple timekeepers:

If you have a large number of timekeepers to enter, you can use a template to upload a list of timekeepers.



- Click 'Import Timekeepers' button
- If no timekeepers have been entered, click 'Blank Template'
- If some timekeepers have been entered, click 'Existing Timekeepers'
- Save Excel chart to your computer
- Enter/Add new timekeeper information to Excel chart (See tab 2 for examples)
- In CounselLink, click the 'Browse' button next to 'Select file to import'
- Click 'Import' button
- Click 'Save'

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Matter Assignments

Matter assignments will be located under the 'Matters' tab. As soon as you have matter assignments, you may begin invoicing your client through CounselLink.

If the matter you need to invoice does not list under the 'Matters' tab in CounselLink, you will need to reach out to your client contact, as the Client handles all matter assignments.

Detailed instructions for submitting invoices and many other topics are provided under the **HELP** link located in the upper right corner of every screen.

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Invoice Processing

Your client will use the CounselLink application to assign matters, and to receive and process your invoices. To accomplish this, all legal invoices will need to be submitted through CounselLink. After the invoice is processed, your client will approve and then provide payment to your firm directly.

To secure prompt and accurate payments to your firm, invoices in structured data format (LEDES) submitted via the web site https://www-p2.counsellink.net is preferred. However, CounselLink accepts invoices in any one of the following two methods:

1. **UPLOAD - Upload a Structured Data File to CounselLink**
   - Export the invoice to the LEDES (ASCII) structured data format
     - **Examples LEDES 1998B, 1998BI, 2000 and XML 2.1**
   - Log into https://www-p2.counsellink.net using your assigned login and password
   - Click on the 'Upload Invoice' link on the law firm home page
   - Browse to the saved LEDES invoice, select it and click "Open"
   - Complete any other necessary information on the Invoice Submission page and click "Submit File"
2. **CREATE ON-LINE - Create an Invoice in CounselLink**
   - Log into https://www-p2.counsellink.net using the assigned login and password
   - Click on the Matter Search link on the law firm home page
   - Search for the matter on which the invoice is to be submitted
   - Select "Create Invoice" from the Action bar dropdown
   - Enter information on the "Edit Invoice Screen" if applicable and click on Submit
   - Enter fees and expenses from the invoice screen
   - Submit invoice

If your firm needs help to prepare to submit invoices through the CounselLink application, our Customer Support department is available 24 hours a day, 7 days a week to assist you.

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Training

We provide a free *OnDemand course* that is available 24X7. The self-navigational module covers a range of topics including:

- Configuration
- Rate submission
- Matter management
- Successful invoicing

We also provide a live, instructor-led course: *Working Efficiently in CounselLink*. The 60-minute class will run twice a month and is free to all participants. Topics that will be covered are:

- Matter Search features and shortcuts
- Updating fees and rates
- User administration
- Outlook integration
- General troubleshooting

Attorney Implementation - Law Firm Registration Support

Any law firms with questions regarding the registration process may contact your Attorney Implementation specialist directly, or Customer Support.

Attorney Implementation is available:

Monday– Friday, 8:00 am to 5:00 pm, Pacific Time

Attorney Implementation: **attorneyimplementation@lexisnexis.com**

Customer Support

CounselLink has a Customer Support team that is available to both corporate clients and law firms. Trained phone representatives are available to answer your questions about passwords, offers, matters, invoices, etc. You can leave a phone message at any time; calls are returned throughout the day. If you prefer, you can always contact the support team via email. The emails are responded to throughout the day. If one of your invoices has failed, and you need further explanation, you can send the invoice to the address below as an attachment. The support team can upload your invoice and help you understand any errors that appear.

Live Operator Phone Support

24x7 Free Customer Support

United States: 1-800-600-2282; Press 2

International: +1 919.378.2713

Email Support

General Support: **ask@lexisnexis.com**

Test Invoices: **InvoiceTest@lexisnexis.com**

WELCOME TO COUNSELLINK!

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