Instructions to Add Timekeepers, Join Registry and Enter Rates in CounselLink

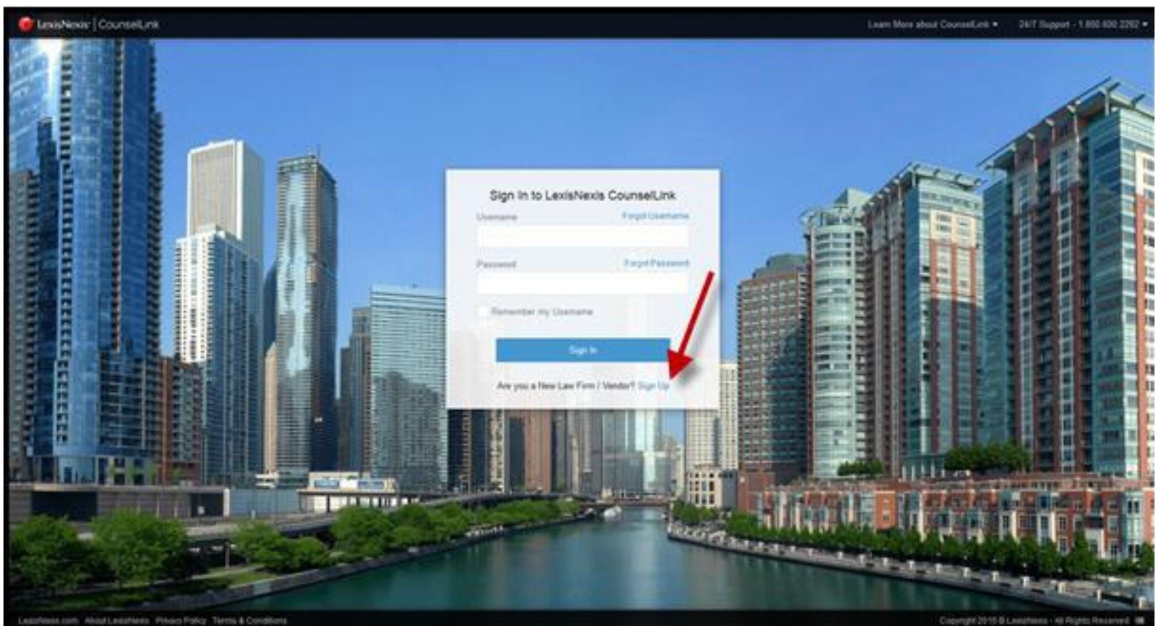
To Begin

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

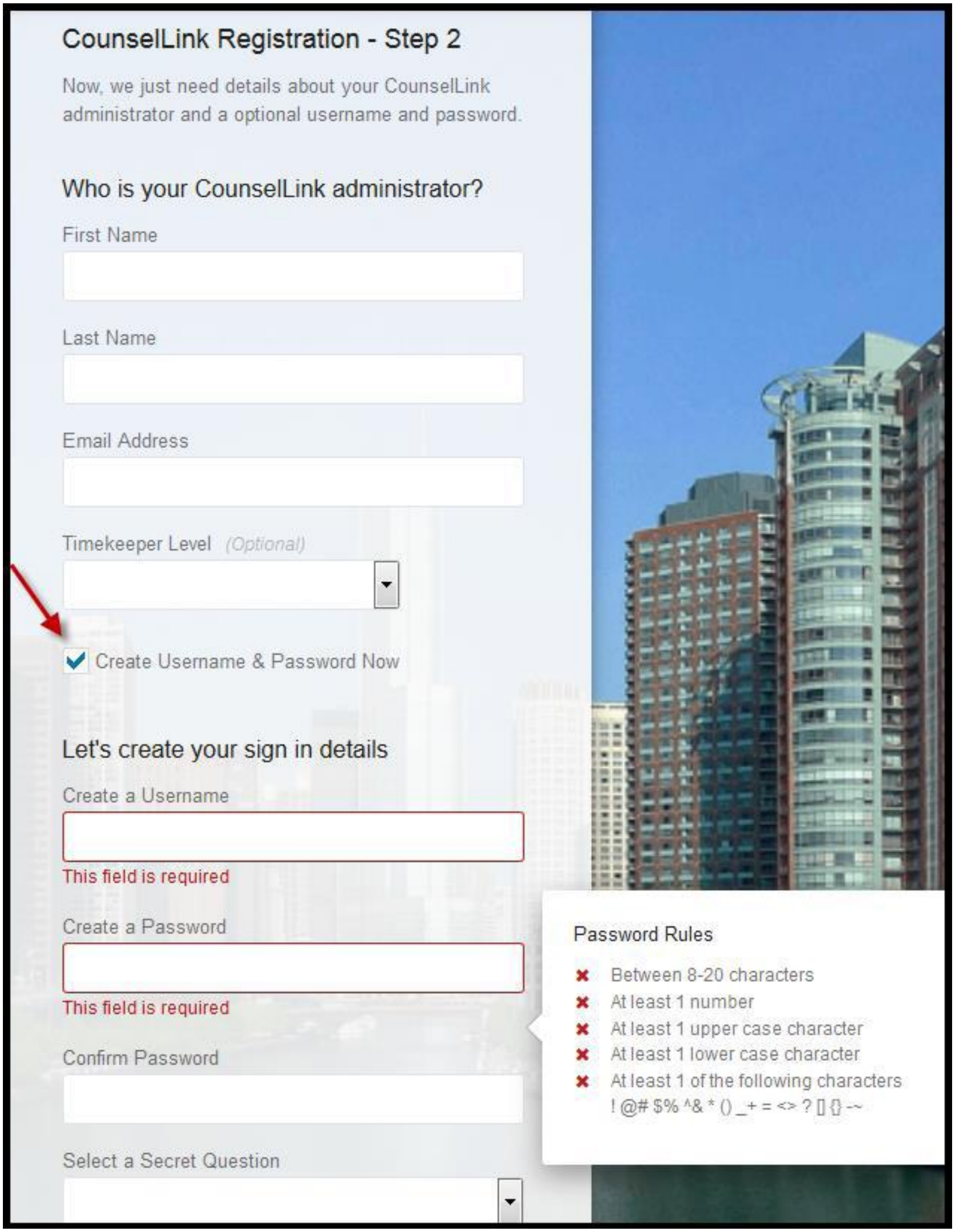
To begin the registration process, go to www.counsellink.net**,** click the **'Sign Up'** link and complete the CounselLink Registration – Step 1 screen.



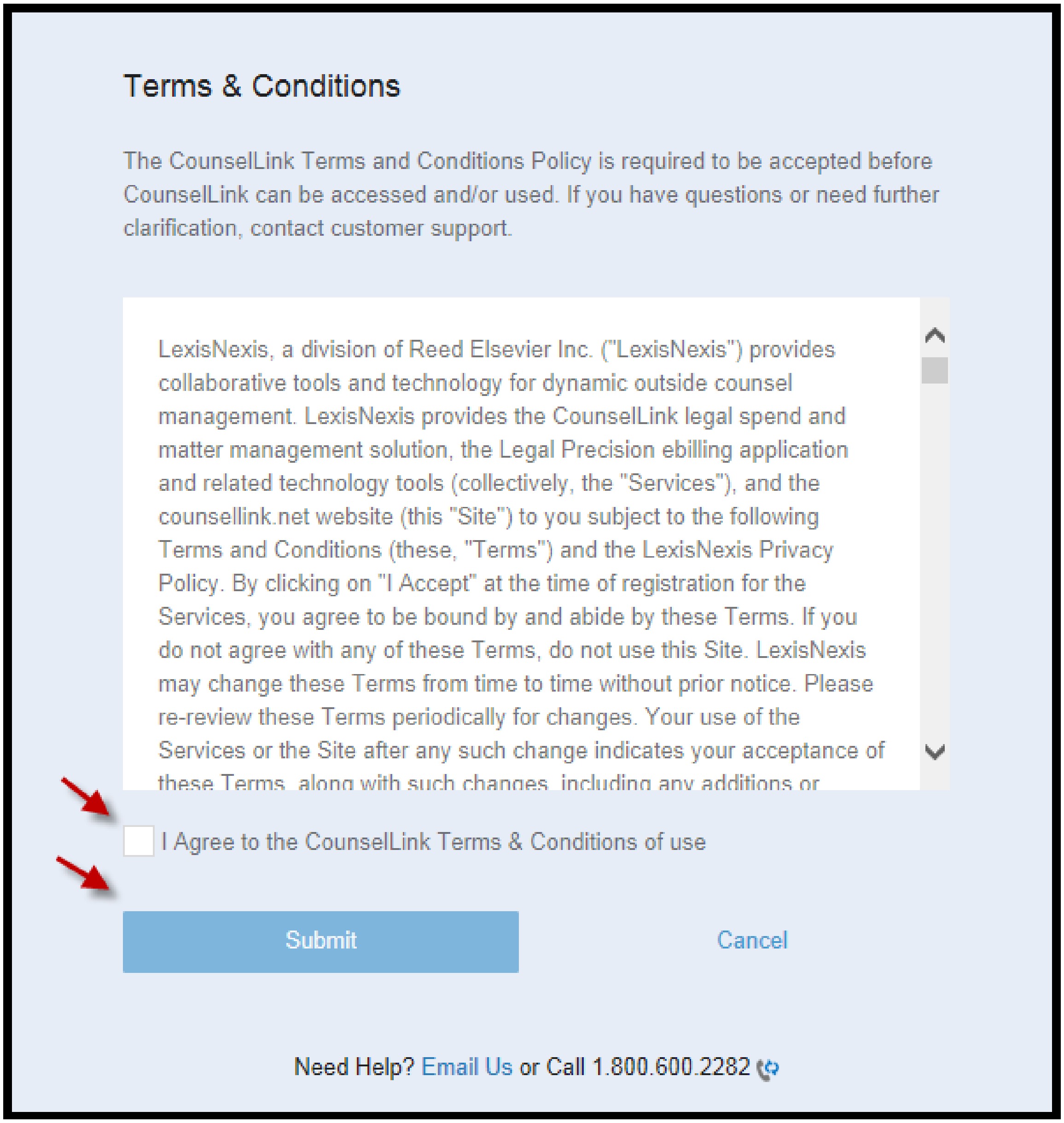
CounselLink Registration – Step 2: Create yourself as the administrator. With this role you are able to add timekeepers, enter rates and other administrative tasks.

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.



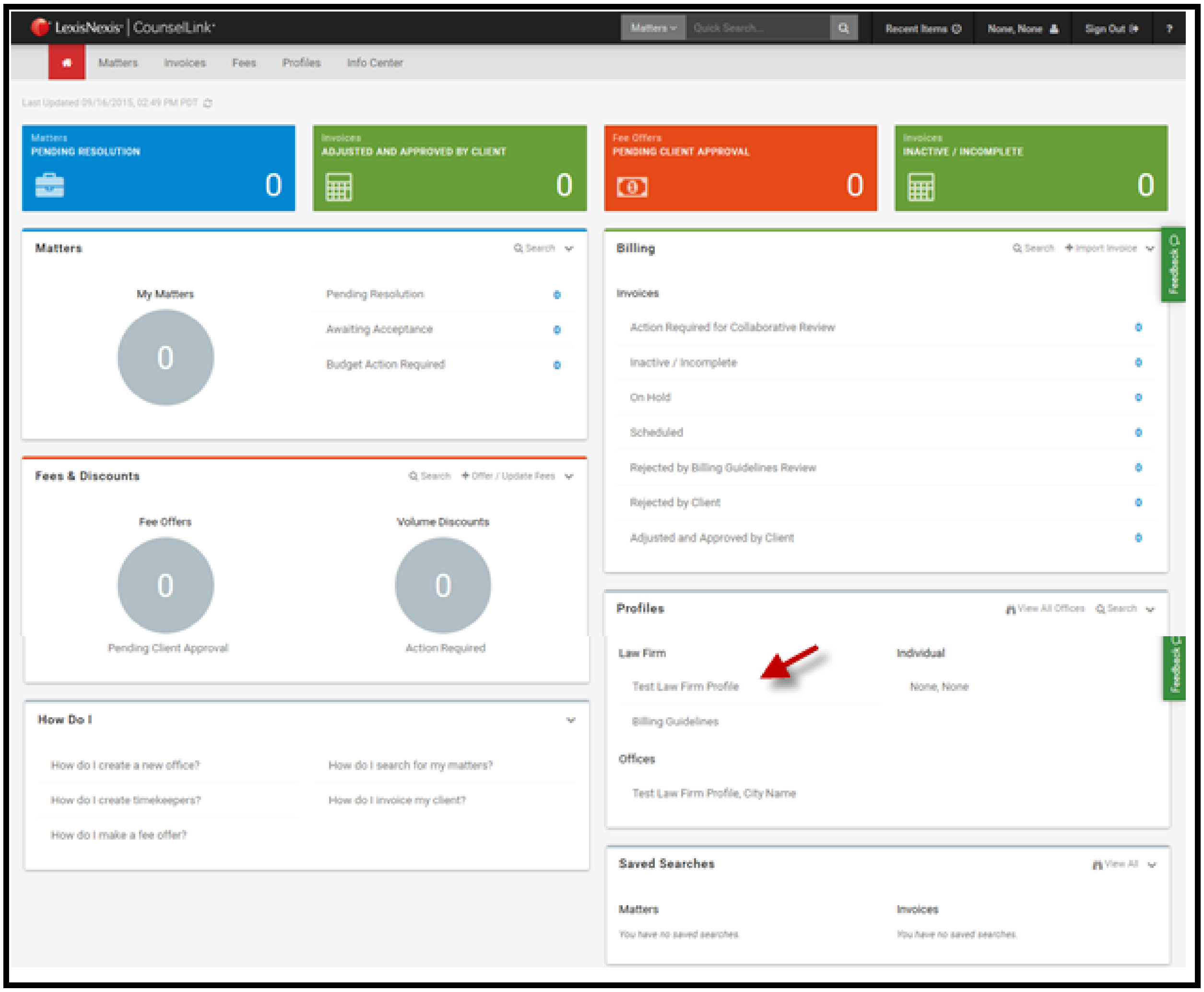
The first time you log on to CounselLink the Terms & Conditions will display. Please review, click **'I Agree to the CounselLink Terms & Conditions of use'** box and click the Submit button. You will now be on the CounselLink HOME page.



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

Law Firm Diversity Information - Edit Law Firm Profile

This process outlines the steps to update your law firm profile information.

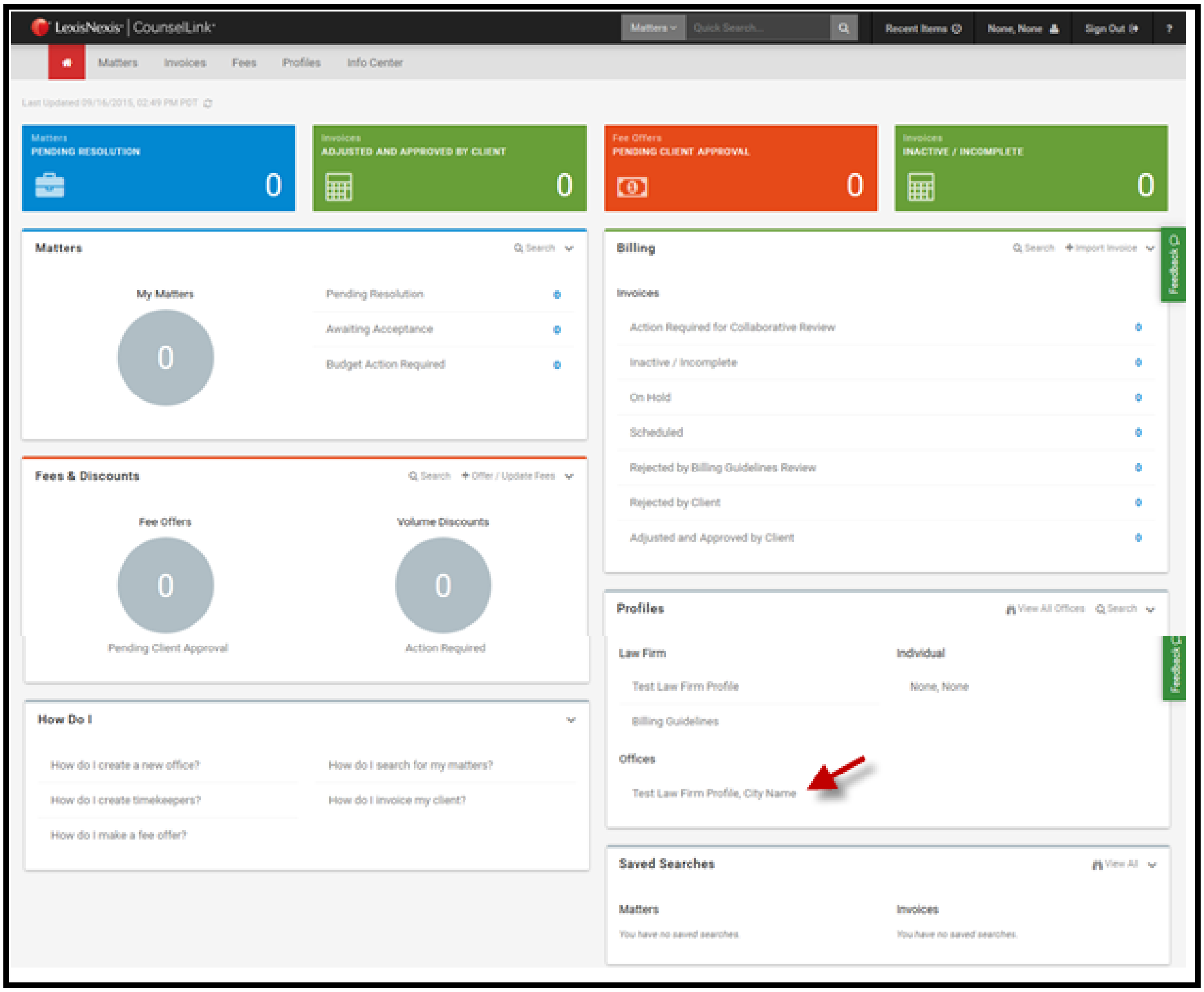


Step-by-Step

1. Click on your law firm name in the top right corner of the screen.
2. Click to expand the Additional Information section in your law firm profile header
3. Click Edit to update your law firm profile information.
4. Click the Check boxes as appropriate.

Add Timekeepers

From the CounselLink Home, under Profiles, click the link under ‘Offices’; example:



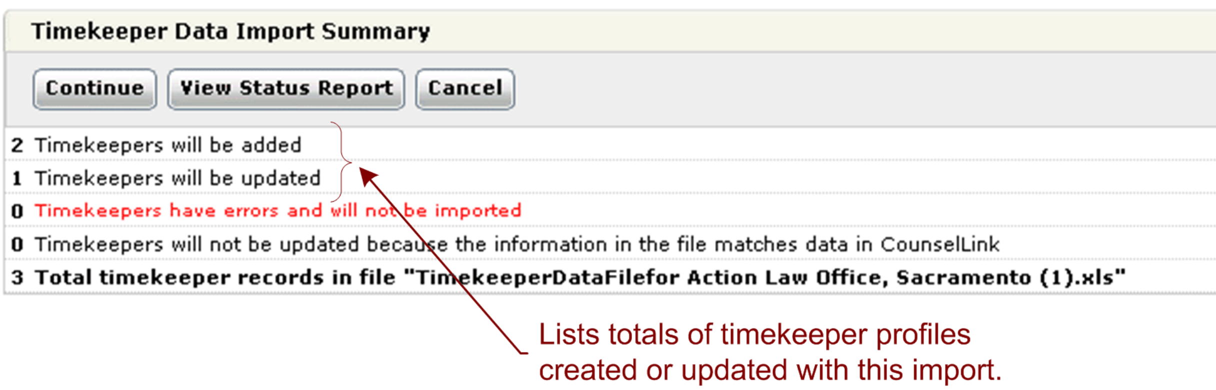
You may **Import Multiple Timekeepers** or add/edit individual timekeepers one at a time. Instructions for both processes are provided below:

To Import multiple timekeepers:

This process outlines the steps to create a profile for many of your firm’s billers in CounselLink. To create a profile for one user, you may wish to follow the steps in **Add Timekeeper or User** instructions below. Note: This task can only be performed by someone with the Admin or Partner role.

Step-by-Step

- At the CounselLink Home page, go to the 'Profiles' section and click the link for the office you wish to upload timekeepers.
- On the Office Profile page, scroll down to the **Office Staff** section.
- Click the **Export Timekeepers** button.
- Save the **Blank Template** to your computer.
- Enter the timekeeper info on to template. Note: Instructions and examples are provided on tab 2. You can enter info by:
  - Typing in the information for each timekeeper; or
  - Create a report of your timekeepers from your time and billing software. Then copy/paste that report into the blank template. The first row with title data must remain in the file. Save.
- In CounselLink, click **Browse** and select the file you have just modified.
- Click **Import** to begin the process.
- At the Timekeeper Data Import Summary, make a selection:
  - Click **Continue** to receive confirmation message.
  - Click **View Status Report** to read information about the file and updates.
  - Click **Cancel** and after correcting the file, re-import the file.



Once the timekeepers have successfully uploaded, please return to the office profile to edit the timekeeper to:

- Designate attorney timekeepers as a Practicing Attorney
- Some client's request you enter Diversity information, e.g. Race, Gender and Disabled Veteran information. Please refer to your client's communication to determine if they require.
- Change Group Type to Registry and enter:
  - Law School + Month and Year of Graduation
  - State Bar License
  - Answer 3 Disciplinary Action questions

Add Individual Timekeeper or User

Go to the ‘Office Staff’ section and click the ‘Add User’ button:

- Complete the **‘Add New Individual’** profile
- Designate Attorney timekeeper as a Practicing Attorney
- Complete Diversity information

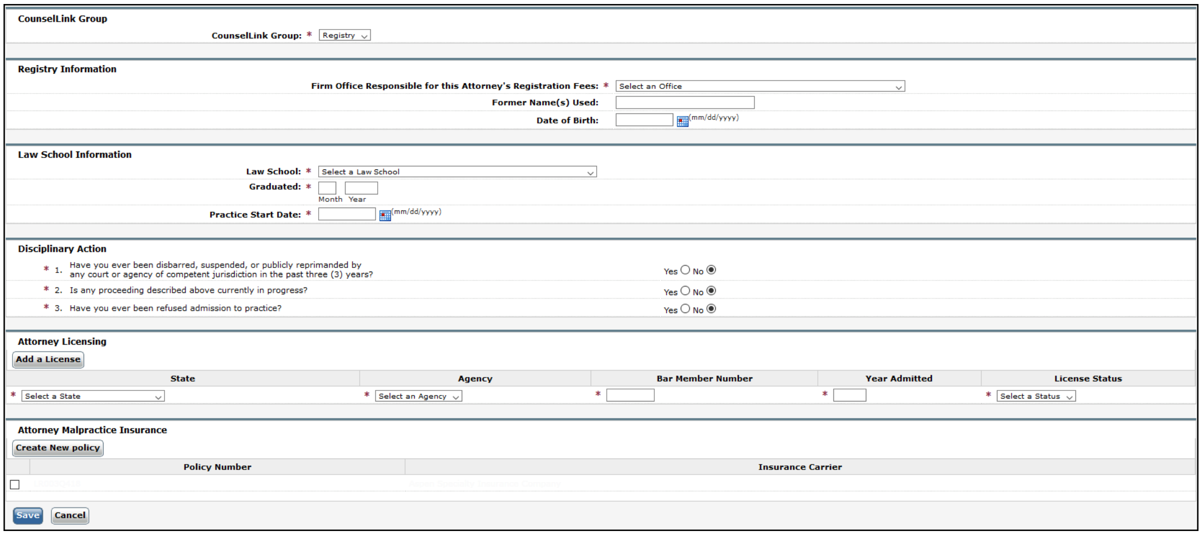
Veteran, Race, Gender, LGBT, Disabled: This information is used for diversity tracking by the corporate customer.

Convert Private Attorneys to Registry Status:

If firm has already **Joined CounselLink Registry**, the system will allow you to convert your attorneys ‘Group Type’ from ‘Private’ to ‘Registry’. If your firm has not yet joined, proceed to the next section first and then return to these instructions.

Attorneys must be converted to Registry status for Credentialing purposes. From the Office Profile, go to Office Staff and click on the Attorneys name. Go to the third section titled ‘Attorney Information’ and if the ‘Group Type = Private’ click the ‘Edit’ button and complete the Registration form. Enter:

- Group Type = REGISTRY
- Former names = example Maiden names, etc.
- Date of Birth = optional
- Law School, month and year of graduation
- Practice Start Date
- Answer 3 ‘Disciplinary Action’ questions
- State Bar License State, License number, Year admitted
- Malpractice Insurance = add check mark next to active policy or ‘Create New Policy’ and apply to all applicable attorneys
- Click ‘Save’
- Return to Office Profile and repeat


CounselLink Group
CounselLink Group: * Registry
Registry Information
Firm Office Responsible for this Attorney's Registration Fees: * Select an Office
Former Name(s) Used:
Date of Birth: (mm/dd/yyyy)
Law School Information
Law School: * Select a Law School
Graduated: * Month Year
Practice Start Date: * (mm/dd/yyyy)
Disciplinary Action
* 1. Have you ever been disbarred, suspended, or publicly reprimanded by any court or agency of competent jurisdiction in the past three (3) years? Yes No
* 2. Is any proceeding described above currently in progress? Yes No
* 3. Have you ever been refused admission to practice? Yes No
Attorney Licensing
Add a License

State	Agency	Bar Member Number	Year Admitted	License Status
* Select a State	* Select an Agency	*	*	* Select a Status

Attorney Malpractice Insurance
Create New policy

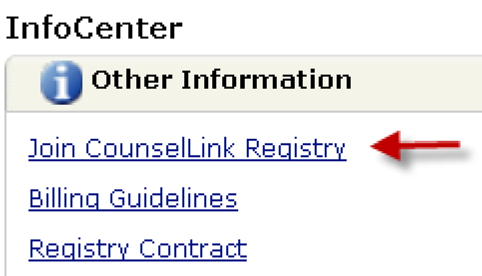
Policy Number	Insurance Carrier

Save Cancel

Join CounselLink Registry

Go 'Join CounselLink Registry' a secondary application must be completed. Go to **InfoCenter** tab (last tab) at the top of the screen

- Click the **Join CounselLink Registry** link



- Read and click **I AGREE** on Disclaimer
- Click **Continue**
- Read/Print Out this **Attorney Registry Agreement**
- Scroll to the bottom of the agreement to "electronically sign" the agreement (enter in the appropriate information in the white boxes) ****Note: A user with the Partner role must log in to access the agreement.**
- Click on **I AGREE**
- Enter in your **Malpractice Insurance Information** (Fax a copy to **866-960-2895**)
    - Click **Save & Continue**
- Select at least one private attorney and designate them as a Registry attorney.
    - Click **Save & Continue**
- Enter in the **ATTORNEY Information:** Law School Information, Disciplinary Action, Attorney Licensing
    - Click **Save & Continue**

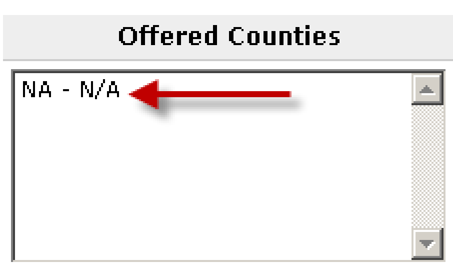
Now return to **Office Profile**, go to **Office Staff** and click the name of the next timekeeper to convert to Group Type = Registry. Go to the Attorney Information section and click **Edit** button. Change the **Group Type** to **Registry** and complete the application.

Offer Fees / Enter Rates

Once all timekeepers have been entered and converted to Registry attorneys, the next step is to enter rates.

To Enter Rates:

- Select Client in the upper left corner of your CounselLink Home page
- Click on the 'Fees' tab
    - Private and Registry fee structures will display
    - You can reduce search results using State or fee structure ID #
- **Step 1: Enter Rates** - Click **'Add Fee Offer'** button (Enter your negotiated rate for this client)
    - Click on the **Fee Structure ID #**
        - NOTE: Some fee structures are designed to have rates entered by the client. You will know that is the case if there is **NO** Add Fee Offer button.
    - **Currency Type**: Select currency type, if different than default
    - **Stage Structure:** Enter level rates for PARTNER, ASSOCIATE and PARALEGAL if listed in top part of fee structure (Note: Default rates are used when a client establishes rule sets that certain tasks be performed by a specified level. Example: Associate billed for a task that a Paralegal should perform.)
    - Under **'Timekeeper'**
        - Enter that timekeeper's hourly rate negotiated for this client
- **Step 2: Effective Date** – Leave default setting of NOW. This field is used for future dates only after an existing fee offer exists, such as entering a new rates to take effect as of the new year next year. You cannot back date. To back date a fee offer, please send a request to your client directly.
- **Step 3: Counties –** You may select specific counties to apply to the fee offer, or you can click the second set of blue arrows to move all counties from the 'Unselected Counties' to 'Offered Counties.'
    - Note: The county of **'N/A'** MUST NOT be included under Offered Counties on Registry fee structures. If NA-NA is listed, move it back to the Unselected Counties box before saving



- Click **'SAVE'** to complete the process
- Repeat process if your firm needs to offer on additional fee structures listed on the **Fee Structure List** screen

Edit Fee Offer Declined by Client

If the client declines the offer, the reason for the decline will be displayed at the top of the offer if the client entered the reason. To view and then edit the offer:

- From the HOME page click '**Fee Structure Search'**
- Click on the '**Fee Structure ID Number'**
- Using the drop down arrow select **'View Offer'** and the message you're your client will display at the top of the offer
- Click '**Edit Offered Fees'** to make changes
- Click **'Save'** and CounselLink will email the client that your offer is again ready for review

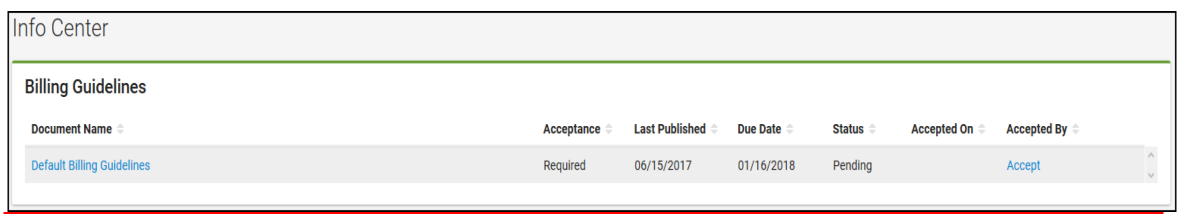
Client Billing Guidelines Acknowledgement

If your client posted billing guidelines in CounselLink, you may access them by going to the **InfoCenter** tab. Please review and incorporate them into your standard billing practices.

If your client requires you acknowledge this document in CounselLink, the system will notify you and provide a link to them at the top of your fee offer when submitting rates. If no acknowledgment box displays, it means your client does not require acknowledgment.

To acknowledge:

- Click the blue **Billing Guidelines** link at the top of the submitted fee offer
    - Or you may also access this document by going to the **InfoCenter** tab and click **Default Billing Guidelines** link
- Add a check mark in the acknowledgement box
- Click '**Accept'**


Info Center

Billing Guidelines

Document Name	Acceptance	Last Published	Due Date	Status	Accepted On	Accepted By
Default Billing Guidelines	Required	06/15/2017	01/16/2018	Pending		Accept

The billing guideline can be viewed on-line or printed by clicking the PRINT link in the upper right corner of the screen.

LexisNexis | CounselLink

Client Action

The next two steps MUST be completed by your client before you can begin invoicing. They are:

1. Review and approve fee offer
2. Assign matters to your CounselLink account

Matter Assignments

Matters are assigned by the client to the firm. Once assigned, they can be located under the 'Matters' tab. As soon as you have matter assignments, you may begin invoicing your client through CounselLink.

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

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 www.counsellink.net is preferred.

However, CounselLink accepts invoices in any one of the following three 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 www.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. EMAIL or MAIL - Alternative Forms of Submission

EMAIL: Create the invoice using your preferred output format, i.e. **pdf; .doc; .txt;** or **.xls**.

In CounselLink search under the **MATTERS** tab to obtain the MATTER ID (column 1) and MATTER TITLE (column 2). Copy and paste this information into the body of the email. Email invoice documents to counsellinkinvoices@lexisnexis.com.

- There should only be ONE INVOICE PER EMAIL, but multiple attachments can be included in the same email.
- Please do not use the "return receipt" option in your email program. A verification email will be sent out that can be used as a receipt.

MAIL PAPER: An original copy of an invoice on white paper. If submitting paper invoices, a separate invoice must be submitted for each matter. When submitting invoices for multiple matters at one time, each invoice must begin on a new sheet of paper and must have a unique numerical identifier. Unique invoice numbers for individual matters may be created by adding a suffix to the invoice number created by your system (e.g., 12345-1, 12345-2, 12345-3, etc.)

Paper invoices should be mailed to:

YOUR CLIENTS NAME c/o LexisNexis Inc.
Attn: CounselLink Invoices
1801 Varsity Drive
Raleigh, NC 27606

3. **CREATE ON-LINE - Create an Invoice in CounselLink**

- Log into www.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.

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: **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

International: +1 919.378.2713

Email Support

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

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

WELCOME TO COUNSELLINK!