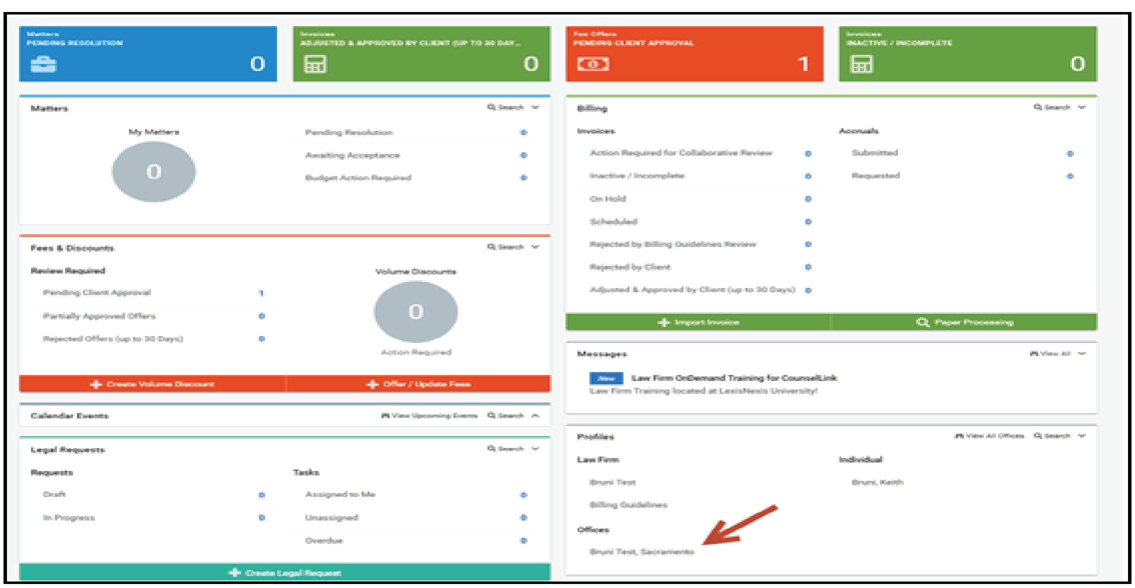
STEP 1: Adding Timekeepers

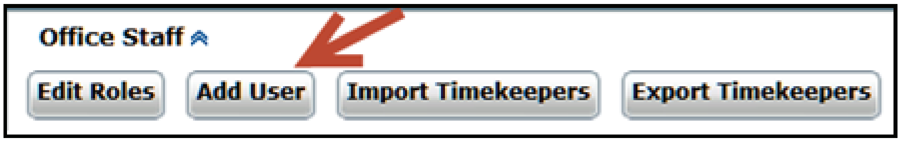
The term Timekeeper refers to anyone who does billable work for a client. Official titles for people who are considered CounselLink timekeepers may include but are not limited to attorneys, paralegals, legal assistants, consultants, etc. Timekeepers must be added to CounselLink before charges can be added for them on any invoice.

Add an Individual Timekeeper

1. In the Profiles section of the Home page under the Offices label, click your law firm office link.



2. Scroll down to the Office Staff section of the profile and click **Add User**.

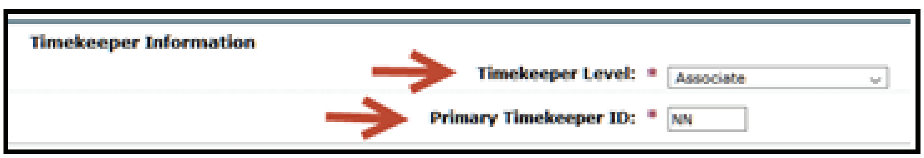


3. On the Add New Individual page, complete all the required fields, as denoted by the asterisk (*).

   Please note the following:

   - If the biller is an attorney, change **Practicing Attorney** to YES. Otherwise leave the default setting.
   - Change **Activate Login** to YES only if this person needs to log into CounselLink. Most timekeepers do not need access. If the default remains NO, an **email address** is not required.

   - The **Primary Timekeeper ID** must match the identifier used on your invoices for this biller. The ID can be numbers, letters or a combination of both.



4. Click **Save**
5. If the timekeeper is a practicing attorney, a Roles screen displays. Do not change the default settings - click **Save**
6. Repeat these steps to add all timekeepers who will bill the client

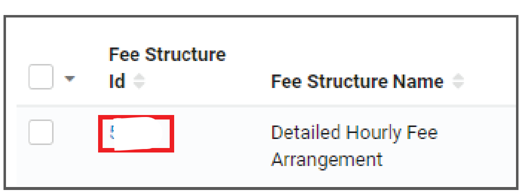
STEP 2: Making an Offer to CATIC

log into CounselLink to enter the timekeeper rates:

1. Confirm that your client's name displays in the upper left corner of your CounselLink Home page. If not, select the client from the drop-down list.

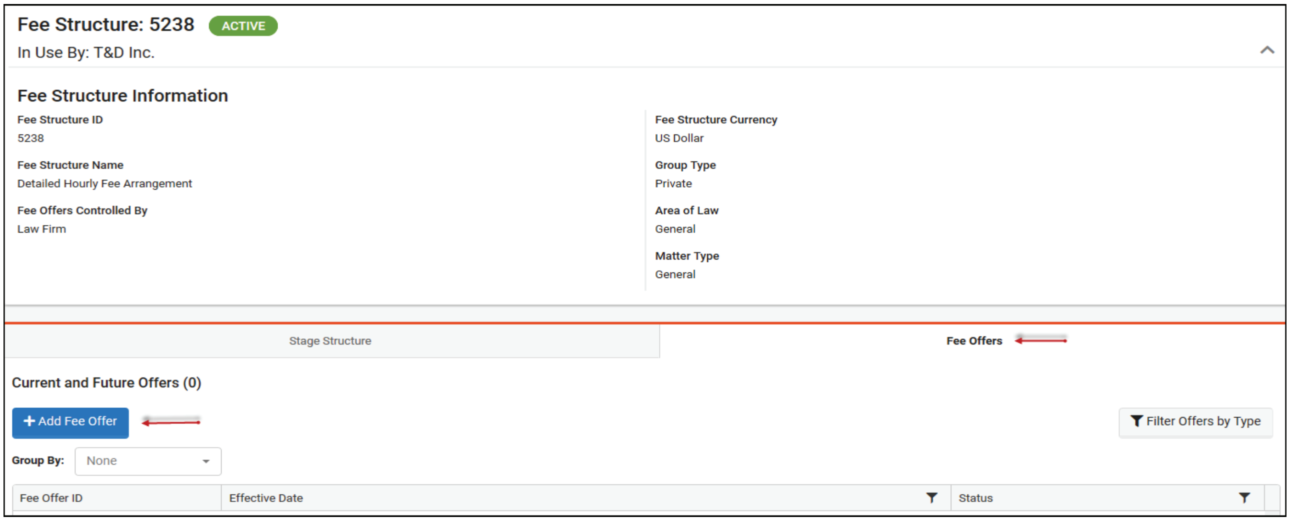
2. Click the **Fees** tab. In the top right corner, confirm the **Fee Structures** view is selected.

3. Click the **Fee Structure ID** link. The Fee Structure Overview page displays.



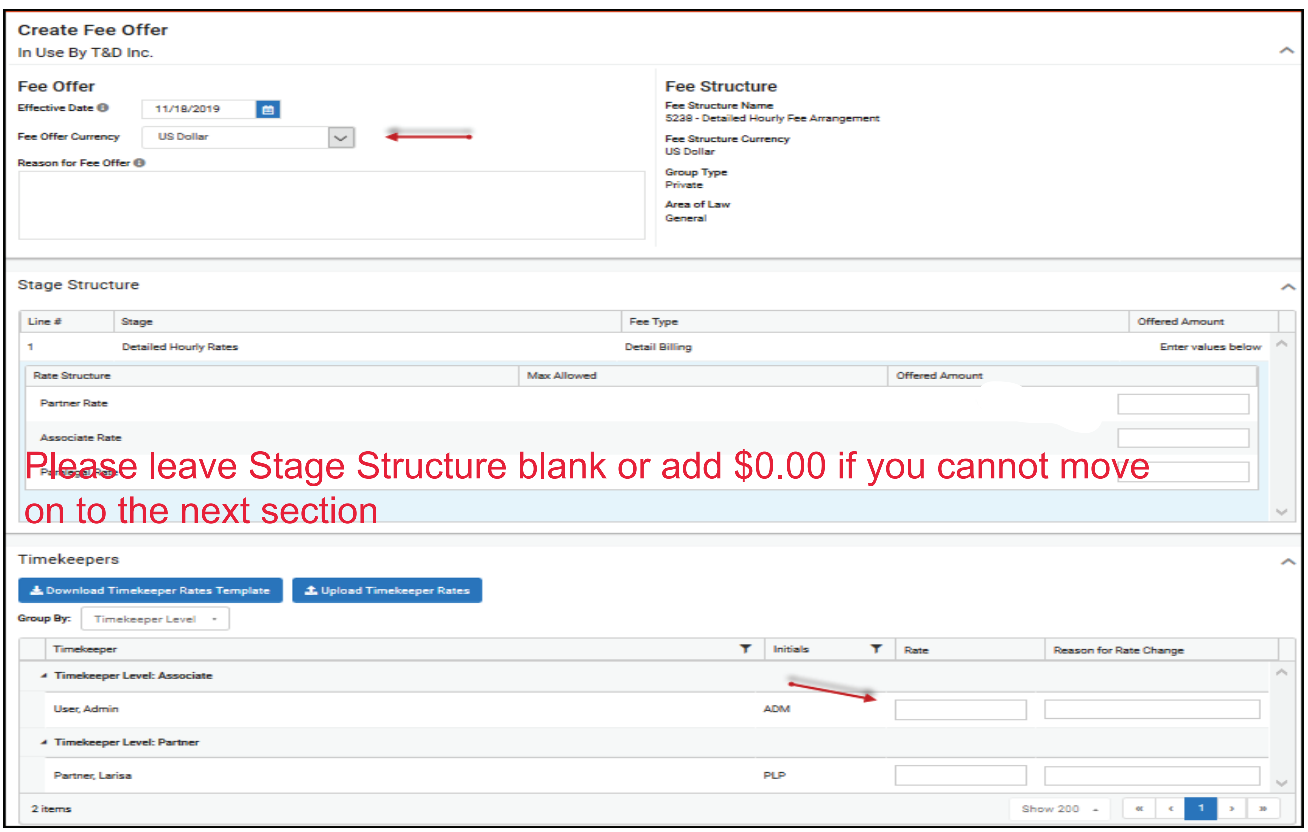
4. Click:
8905 General Detailed Hourly Fee Structure in use by CATIC

5. Select the **Fee Offers** tab



6. Click the **Add Fee Offer** button. The **Create Fee Offer** screen displays.
7. **Effective Date**: Leave the default date set to the current date.
8. **Fee Offer Currency:** Select if different from the default value.
9. **Offered Counties:** Leave the default state and counties of **N/A - N/A.**

10. **Timekeepers:** Enter the timekeeper's hourly rate in the Rate box for each individual timekeeper that will be billing for this client's matters. Note: If a listed timekeeper will not bill this client, leave their box blank. **Do not enter $0.**



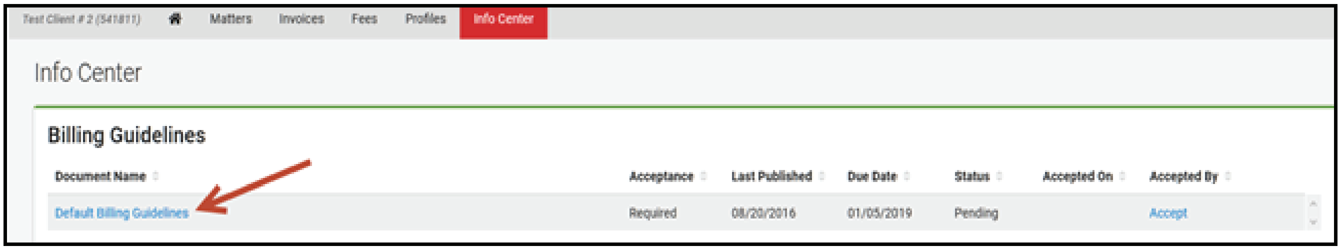
11. Click **Save**, then **OK**. The fee offer will show a 'Pending Approval' status. CounselLink notifies your client that your rates are ready for their review.

Note: If your client requires that their Billing Guidelines be acknowledged online, a notification displays at the top of the screen. See instructions below for how to **Acknowledge Billing Guidelines**.

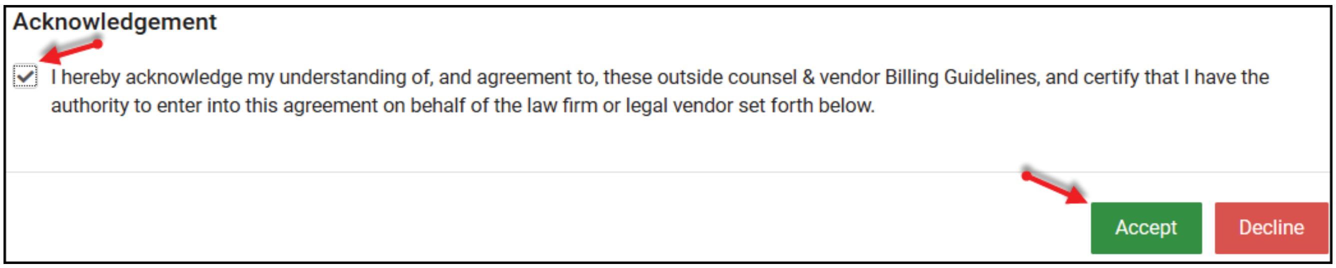
STEP 3: Approving CATIC's Billing Guidelines

Your client may require that you acknowledge their billing guidelines online. To access the guidelines:

1. Select to the **Info Center** tab
2. Click the **Billing Guidelines** link



3. The billing guidelines can be printed by clicking the Print link in the upper right corner of the page
4. The Billing Guidelines Agreement Confirmation displays
    a. Select the check box to acknowledge the statement
    b. Click **Accept**



Please now go to the PDF entitled "3. Upload OR Email Your Invoice to CounselLink" for instructions for submitting invoices