Zurich Legal Bill Review
Law Firm – Frequently Asked Questions (FAQ)

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Contents

General Information

Legal Bill Review

Legal Bill Review (LBR) is a group of **Zurich North America** employees who review legal invoices for compliance with Zurich's Litigation Management and Billing Guidelines. The group generally consists of attorneys and paralegals. The Legal Bill Review operations team assists with questions about enrollments, rates, fee offer status, payment inquiries and general billing processes. LBR also handles firm updates such as firm name changes, tax id and/or address changes, etc. To contact LBR please email the following: Legal Bill Review.

Litigation Management

The Litigation Management group is a unit within Zurich North America Claims. The group consists of attorneys, paralegals, and former claims professionals. They are the relationship managers for each of the 5,000 plus external law firms that handle Zurich's litigated claims. They author Zurich's Litigation Management Guidelines and are available to discuss all matters relevant to Zurich's litigation management and billing expectations. Each firm has a dedicated Regional Litigation Manager (RLM) who will act as your firm's liaison with Zurich. If you are unsure of your designated RLM, please contact Litigation Management Group.

CounselLink

CounselLink is the outside vendor that Zurich utilizes for the uploading and processing of legal invoices. Please contact Legal Bill Review to begin the CounselLink registration process. You may open the CounselLink homepage by clicking here: CounselLink. CounselLink will provide technical assistance with utilizing their system such as creating fee offers, uploading an invoice/appeal, etc. CounselLink may be contacted at ask@lexisnexis.com.

Fee Offers

Once registered with CounselLink the firm can then begin to submit Fee Offers for their matters. These Fee Offers should identify agreed upon rates between Zurich and the firm. An approved Fee Offer is required prior to a Zurich matter being linked to a firm in CounselLink.

HOW TO IDENTIFY THE CORRECT FEE OFFER

Reference the Zurich assignment letter for the matter that needs to be billed. The assignment letter will identify the line of business/area of expertise and applicable rates.

If the firm has a signed Service Level Agreement (SLA) with Zurich, panel rates will be outlined in the SLA Agreement based on the line of business and type of case being referred.

For firms designated as Non-Panel, the Non-Panel Fee Offer in CounselLink (Fee Structure Id 9309) is to be utilized. The firm will upload the highest approved rate for Partner/Associate/Paralegal or other ranks approved by Zurich. While the rate entered will be the highest rate allowed for a single claim file, this is not a blanket approval for all non-panel matters. The firm will bill the rates outlined in the assignment letter.

For firms designated as Insured Select Counsel (ISC), the ISC firm will utilize one of the designated ISC fee offers based on the line of business and/or area of expertise (AOE). Firms will utilize the rate approved for the specific insured, as there may be different rate structures for other Zurich insureds. The rate entered will be the rate agreed upon by Zurich, the insured, and the firm.

Any communication regarding an increase should be communicated with Litigation Management.

If any questions arise on which fee offer to utilize in CounselLink, please contact the appropriate RLM aligned with the firm.

WHAT IF THE INCORRECT FEE OFFER IS ATTACHED TO THE FIRM'S MATTER

Assignment documentation provided to the responsible attorney should identify the claim number, line of business or area of expertise and the applicable rates for that matter. If you believe the incorrect fee offer is aligned to your matter, contact Legal Bill Review before submitting an invoice.

What if CounselLink indicates rate deviations on my invoice?

- Confirm the Fee Offer aligned with your claim number is correct including the correct firm location (see above);
- Confirm submission of Timekeeper Ranks in the fee offer, and approval in CounselLink;
  - Fee Offers are generally approved in 5-7 business days;
  - Rates that require further review from the Claims Professional/Regional Litigation Manager may take longer; and
  - If rates are outstanding after 10 days, you can reach out to Legal Bill Review for status.

When to contact Legal Bill Review regarding rates:

- Your firm has submitted rates more than 10 business days ago and they are still unapproved;
- Your firm has been assigned a new case that has rates that differ from your approved rates in CounselLink;
- If your firm submits rates that are claim or insured specific where a prior fee offer has not already been approved;
- If you are unsure of which Insured Select Rate to utilize; and
- If your rates have been rejected and you are unsure of the reason.

Invoice Submission

Should I review my invoice in the submission queue before final submission to Zurich?

Yes. Zurich encourages law firms to review the invoice prior to activation. The firm should review any potential questionable entries prior to final submission. If you notice multiple adjustments, please do not finalize the submission until all issues are resolved.

I have uploaded an invoice into CounselLink and see billing adjustments. Is this the full extent of your review?

No. The CounselLink software has been configured so that the law firm can immediately determine whether there are any rate and/or timekeeper issues with the invoice. If you see these adjustments, we encourage you to withdraw the invoice, fix the issue, and then resubmit the invoice.

This preview function is provided as a courtesy to the firm, and it does not represent the full extent of Zurich's review of the invoice. The final approved invoice may contain fewer, or more adjustments based on Zurich's complete review of the invoice in compliance with Zurich's Litigation Management Guidelines.

I uploaded my invoice, and it has remained in 'Auditor Review' status? When can I expect the invoice to be released for payment?

There are various reasons an invoice may have been delayed for release. First, please check with the partner in charge of the file at the firm to determine that all the necessary documents/information that Zurich has requested, (i.e., litigation plan, budgets, etc.), have been sent and received by the Claims Professional. If the partner in charge does not provide the needed direction, then please follow up with Legal Bill Review. (See below Firm Information and Payments on review timeline standards)

My invoice was rejected. What now?

Invoice rejections can happen for a variety of reasons. If LBR rejects an invoice, there will be a comment added which will include the reason. The firm should review the comment, and, if applicable, correct the invoice and resubmit. If the firm still has questions on the rejection, please reach out to **Legal Bill Review.**

I submitted an invoice and received less than full payment. What does this mean?

Legal Bill Review reviewed the invoice for compliance against Zurich's Guidelines. If the firm chooses to dispute the reductions, please review the appeal section of this document as well as the CounselLink Help Menu for further instructions on how to submit an appeal. Resubmission of deducted fees/expenses on new invoices is not permitted.

Do I need to label attachments to invoices? How?

Supporting documentation should be labeled identifying the documents it represents and the dates incurred. This should clearly indicate what is contained in each individual attachment (Ex: John Smith Marriott Receipt $140.00; Smith Court Reporters $400.00; John Smith Parking Receipt $25.00; Notice of Deposition John Smith; John Smith Deposition Summary). Firms are encouraged to attach supporting documentation at the line-item level for quick reference on the invoice.

Generic naming of supporting documentation attached to appeals may result in the appeal being denied. Separating documents will streamline the review process for both the firm and Zurich. Appeals received by Zurich containing no supporting documents when requested or in a format that cannot be viewed by Zurich, may result in the appeal being denied.

Shared Defense / Cost Share/ Allocation

How do I set up a case in CounselLink with a shared defense/allocation?

The litigation task issued by the Zurich claims professional should establish the cost share owed by Zurich. If you believe the cost share to be incorrect, contact the Claims Professional directly for verification. Once the firm has accepted the litigation task issued by the Claims Professional, the file will populate in the CounselLink billing software. The firm will bill the invoice at 100% and the Legal Bill Review Department will apply the cost share/allocation outlined in the litigation task. If the firm uploads a pre-split or an invoice with the cost share already applied, it may result in the invoice being rejected. If you need technical assistance with this process, please contact CounselLink Support.

What if the cost share percentage changes?

Zurich can only accept one cost share percentage per invoice. If your cost share changes during your billing cycle, two invoice submissions will be required to capture each cost share.

When my invoice was released in CounselLink, Zurich changed the cost share percentage. Why?

Zurich obtains the most current cost share information from the Claims Professional. If you feel the cost share percentage listed on the released invoice was incorrect, please consult with the attorney/claim handler first to verify the current cost share percentage. If it is determined that the invoice was released incorrectly, please contact LBR.

Travel

How do I capture travel on an invoice?

All travel entries should be separate from other entries. Entries that combine the time attending a litigation event and travel time may be adjusted accordingly. Based on the Litigation Management Guidelines, Zurich will only pay half the applicable time for travel. It is acceptable for the attorney to reduce the rate by 50% and keep the travel units in full. The billing entry must indicate the actual travel time.

Example: “Travel to Plaintiff Deposition 2.00 hours”, billed 1.0 hours.

Example: “Travel to Plaintiff Deposition 2.00 hours”, reduced rate in half.

Appeals

How do I submit an appeal in CounselLink?

Please contact CounselLink for step-by-step instructions and help.

What are the deadlines for an appeal?

Zurich accepts two appeals within 60 days from the date the invoice is released for payment. If the appeal time frame has expired, an appeal cannot be made on that invoice without approval from LBR.

How quickly are appeals processed?

Zurich typically reviews appeals within 21 days from the date the appeal is "Finalized." If the firm fails to finalize the appeal, the appeal cannot be viewed by Zurich.

Where do I attach my supporting documentation for appeals?

Please attach supporting documentation to the appeal itself in a PDF format only. There is currently a size limitation of 4mb per document. Appeals received by Zurich containing no supporting documents when requested by Zurich or in formats that cannot be viewed, may be denied. Please refer to the Invoice Submission section for more information on how to label attachments.

Firm Information & Payments

Non Prompt Pay Firms
Review of invoices can take up to 42 days after submission. Zurich issues one batch payment per month around the 17th. Please allow 10 business days to receive the check via mail. If your law firm would like to enroll in our EFT/ACH program, please contact Legal Bill Review. This is highly encouraged and Zurich does not charge for this service.

- Invoices released prior to the 12th of the month are generally included on that month's batch payment around the 17th.
- Invoices released by Zurich after the 12th of the month, are added to the following month payments around the 17th.

Prompt Pay Firms
Zurich offers a Prompt Pay Program for firms whereby 95% of a firm's invoices are to be paid within 21 business days from the date of invoice submission. In exchange for this prompt payment, the firm agrees to a small discount to the legal fee portion of the firm's billing. For further information, please contact the Litigation Management Group.

Zurich issues TWO batch payment per month around the 15th of the month and the last day of the month.

- Invoices released prior to the 12th of the month are generally included on that month's batch payment around the 15th.
- Invoices released by Zurich between the 13th of the month and the 29th of the month are on that second batch payment check typically received on the last day of the month.

Reconciling Paid Invoices/Appeals:

- Payment remittances are included with a copy of the check or sent via e-mail to the main Firm Administrator Contact (if paid via EFT/ACH).
- The firm is responsible for reconciling their outstanding accounts receivable.
- If your firm has confirmed the batch payment received is missing certain invoice payments, please reach out to Legal Bill Review.

Firm Information Changes:

- For changes to your firm's name, tax ID or address, please complete the following.
    - Send a current W9 to Legal Bill Review **before** updating your firm's information in CounselLink.
    - PLEASE NOTE: Updating information directly in CounselLink WILL NOT change this information for Zurich payments.

Please note that payments cannot be processed properly if the firm's financial information is not provided to Zurich.

Missing Payments:

If your firm is unable to account for a payment:

- Confirm the date it was released in CounselLink and review the above payment information.
- If the invoice or appeal are over $75,000 this may require a second-tier approval within Zurich Claims. Check the following month's batch payment before sending an e-mail to Legal Bill Review.
- If it has been more than 10 business days since a batch payment was processed, contact Legal Bill Review. Provide the claim numbers and invoice numbers of the payments you are missing. They will provide confirmation and issue a stop payment request if required.

Billing Guidelines for Defense Counsel

How do I obtain a copy of Zurich's Guidelines for Claims Defense Counsel?

Please send an e-mail to the Litigation Management Group or Legal Bill Review.

I have questions regarding Zurich's Guidelines. Who can assist me?

Please send an e-mail to the Litigation Management Group. The Regional Litigation Manager in your area will contact you to help.

Contact Information

Zurich Legal Bill Review
E-mail:
usz.zurich.legal.bill.review@zurichna.com
Phone: 847-605-3718

Zurich Litigation Management
E-mail:
zurich.litigation.management@zurichna.com
Phone: 847-605-3718 (Same as LBR)

CounselLink
Email: ask@lexisnexis.com
Phone: 800.600.2282

APPENDIX

1. Litigation Management Guidelines
2. ACH Form
3. Prompt Pay Registration Agreement
4. CounselLink Law Firm User Guide