

## APPENDIX B – APPEALS

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

### A. When is it appropriate to appeal?

1. 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.
2. Appeals can also be made if providing additional information about the activity might justify the original billing.
3. Appeals should also be made if our payment is not correct. Occasionally, a cost share or rate applied is incorrect, as examples.

### B. Appeal Submission Methods.

Presently we have transitioned all our invoice processing to CounselLink. Appeal processing will be in CounselLink as well.

1. CounselLink appeal functionality should be used for invoices with line-item adjustments.
2. CounselLink only allows for appealing line-item adjustments. If the firm needs to appeal an invoice level adjustment, such as cost share or a discount, this must be done by submitting a LISA ticket to LABS Support. The ticket should include the invoice number and details of the requested adjustment reversal. This process should also be followed for any invoices where the firm is appealing a combination of invoice and line-item level adjustments.
3. A firm submitting a paper invoice must be set up in CounselLink and shall have the ability to submit their appeal electronically in CounselLink. (This is done similar to #1).

For submission methods 1 and 3, additional details are provided below.

### C. Overview

1. The firm will not be able to systematically appeal an invoice until the invoice status is showing "Provider Review." Prior to moving to Provider Review status, the invoice status will show as "Pending Payment" to allow time for payment to be issued.
2. Appeals must be submitted within 45 days of payment of the original invoice.
3. Only line-items that have been adjusted can be appealed and only up to the adjustment amount.
4. An appeal reason must be entered for every line-item being appealed.
5. Any reduced line not being appealed does not require action to be taken by firm. However, the firm may select that line-item and click the Accept button to provide Liberty with a comment as an option.
6. If the original invoice qualified for and a discount was taken, then any subsequent dollars paid back on appeal will also be subject to the same discount.

### D. CounselLink appeal functionality should be used for invoices with line-item adjustments.

1. Log into CounselLink.
2. Click the Invoices tab (**OR** if you know the invoice number, type that into the Invoice Quick Search on the Home tab).
3. In the View drop down (located on the right side of the page) select **Action Required for Collaborative Review**.
4. Click on the invoice you wish to appeal. Confirm **Invoice Status** is showing Provider Review.



5. The law firm user will need to decide for every adjusted charge line – accepting or appealing adjustments as applicable.
6. Select **Accept Review** from the **Workflow Action** drop-down list.
7. A confirmation message appears.
8. Click **OK**.
9. The interface refreshes and the Accept, Appeal, and More Actions button appear near the top of the Charges section.
10. Find a charge line with an adjusted amount in red.
11. Click the box(es) at the left of a charge line. You can appeal or accept Liberty's write-down of a charge or multiple charges.
  - a. Click **Accept** if you accept the charge adjustment. Click **OK** at the confirmation window. Enter text in the Note Text box (required) at the Accept Multiple Adjustments screen. Click **Save** to continue. It is not mandatory to click on every adjusted line to accept the reduction. Liberty will know when a line-item has been accepted due to the lack of the firm posting a line-item note appealing the reduction.
  - b. Click **Appeal** to appeal the charge adjustment. Click **OK** at the confirmation window. Enter text in the Note Text box (required) at the Accept Multiple Adjustments screen. Click **Save** to continue.
12. Documentation should be attached to the invoice to support consideration of your appeal.
13. Repeat each adjusted charge.
14. After reviewing all the charge adjustments, complete the review and go to the **Workflow Action drop-down field** and choose **Accept all Adjustments** if there are no appealed line-items on the invoice OR **Return Appealed Invoice Back to Client** to submit the appeal to Liberty Mutual.
15. CounselLink appeal functionality only allows for appealing line-item adjustments. If the firm needs to appeal an invoice level adjustment such as cost share or a discount, this must be done with submitting a new invoice in CounselLink using the original invoice number followed by "-Appeal." This process should also be followed for any invoices where the firm is appealing a combination of invoice and line-item level adjustments.

#### E. Steps to Create Manual ("-Appeal") Appeal Invoice:

1. Log into CounselLink.
2. Search for the matter for which the invoice will be created.
3. Click the **Invoices** mini-tab within the Matter Overview page and click the **Create** button to begin creating the manual invoice.
4. The invoice # entered must be original invoice # followed by "-Appeal." *For example: If original Invoice is 12345. New invoice must be given # 12345-Appeal*
5. All manually created appeal invoices and individual lines must only be generated for the dollar value being appealed and at pre-cost share amounts.
6. 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).

Example 1: Appealing Cost Share: Original Invoice Total Amount: \$800 fees + \$200 expenses = \$1000. Liberty Mutual took a 50% Cost Share and paid law firm \$400 fees + \$100 expenses = \$500. Firm believes cost share taken in error and appeals the \$400 and \$100 cost share reductions. The line-items will look like this (must be shown as 1 Unit at \$ amount appealed):

EXAMPLE 1: Appealing Cost Share



Description	Units	Rate (USD)	Amount (USD)
iled Hourly	2		\$500.00
Cost Share of 50% FEES taken in error - no CS on this matter	1	\$400.00	\$400.00
Cost Share of 50% EXPENSE taken in error - no CS on this matter	1	\$100.00	\$100.00

- a. If you wish to appeal both invoice level dollars (such as 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.
- b. 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.*"

**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 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, Liberty will apply appropriate cost share when responding to appeal).

Description
iled Hourly
Cost Share of 50% FEES taken in error - no CS on this matter
Cost Share of 50% EXPENSE taken in error - no CS on this matter
Appeal: Depo time included 45 minutes of waiting for client who was late. Orig LI#: 6

7. **Paper Invoice Appeals.** A firm submitting a paper invoice must be set up and registered in CounselLink and shall have the ability to submit their appeal electronically in CounselLink. (This is done similar to #1). If you wish to appeal an invoice that was submitted as a paper invoice, please follow these instructions:
  - a. Log into CounselLink to view the reductions made to the invoice. To locate the invoice in CounselLink, search either for the invoice number or the matter number in the Quick Search at the top right of the page.
  - b. Invoices submitted originally in paper form will show all the fees rolled up to 1 line-item. To view the originally submitted paper invoice, click on the Documents tab, select the invoice to view and then click Download.



Documents			
<div> <div>Edit</div> <div>Copy</div> <div>Delete</div> <div>Download</div> </div>			
<input type="checkbox"/>	Name	Description	Category
	Invoice 2097710		Attached Document

You will then follow the instructions in **Section 1** to proceed with submitting the appeal invoice for the reduced dollars.

## F. Frequently Asked Questions

- 1. I just received my payment for the original invoice less reductions and I want to submit an appeal. However, the invoice is still in Pending Payment Status. When will the system allow me to appeal?**

The invoice must be in Law Firm Review status before the system allows you to appeal. The invoice will move from Pending Payment status to Law Firm Review automatically within 15 days of the invoice having been approved, by the time you receive payment. You may either wait for the invoice to update or you can contact [LABS@LibertyMutual.com](mailto:LABS@LibertyMutual.com) and request it be manually updated. If, however, you want to appeal invoice level reductions such as cost share or invoice level discounts, then all appeals resulting from the original invoice must be made in the same way using the “-Appeal” 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 pre-cost share or net of cost share?**

Always submit your appeal line-items at pre-cost share (or pre-discount) amounts for both Units and Rates. Liberty Mutual, during review of the appeal, will apply the appropriate cost share or discount to the appeal invoice.

- 4. I submitted my appeal, and Liberty paid me for the line-items I appealed but took the discount. Why?**

If the original invoice qualifies for a discount, then any monies subsequently paid out on appeal will also be paid with the discount. Conversely, if the discount was not paid on the original invoice, it will not be taken on any appeal dollars.

