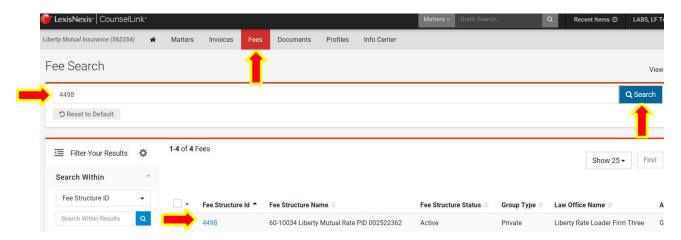
APPENDIX D - FLAT FEE & HYBRID TASK BASED BILLING IN COUNSELLINK

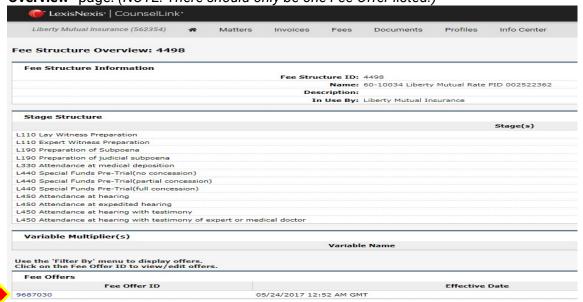
Flat Fee Task Based Billing

The Flat Fee Task based billing arrangement is handled in CounselLink through "Stages." These stages are defined for each Fee Structure that is assigned to each matter. A stage is created for each distinct task with a specific rate. In the example below, we will use the CounselLink Fee Structure ID of '4498' which has a Flat Fee Task based billing fee structure type. To view this fee structure, follow the steps listed below:

- 1. Click on the "Fees" menu tab item on top of the CounselLink page.
 - a. Enter "4498" on the Search field.
 - **b.** Click the "Search" button.
 - c. After the search results are returned, click on the "4498" Fee Structure ID link to view the "Fee Structure Overview" page.

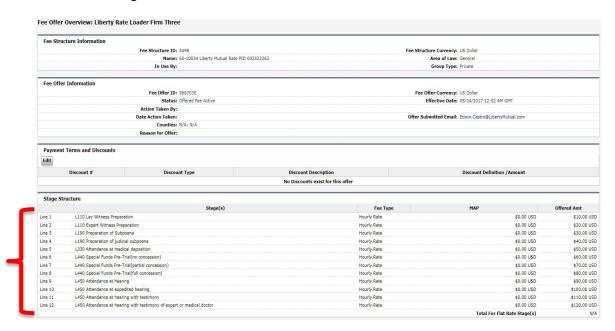


2. From the "Fee Structure Overview" page, locate the "Fee Offers" section at the bottom of the page and click on the "Fee Offer ID" link to display the "Fee Offer Overview" page. (NOTE: There should only be one Fee Offer listed.)





3. From the "Fee Offer Overview" page, you will see all the stages associated with the Fee Structure under the "Stage Structure" section shown below:



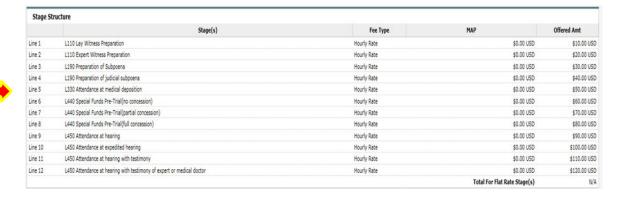
- a. Each line on the "Stage Structure" section represents a stage.
- **b.** In the example above, there are twelve lines or stages each with a distinct stage description and "Offered Amount" or rate.
- c. Internally in CounselLink, "Line 1" in this example is referred to as the "[S1]" stage, "Line 2" is the "[S2]" stage, the "Line3" is the "[S3]" stage, and so forth.
- **d.** You will need to make a note of this "internal CounselLink" stage designation as you bill various stages through your firm's billing system as described below.

There are two ways to create and submit invoices for Flat Fee Task Based Billing:

1. Using Your Firm's Billing System

- a. Using your firm's billing system, you must properly direct the billing of each invoice line-item to a specific stage of the fee offer. You do this by using the "internal CounselLink" stage designation. Please note, manual correction after the invoice is uploaded will result in inaccurate billing.
- b. Using the above "4498" Flat Fee Task Based Fee Structure example, you may choose to bill against "Line 5" for the "L330 Attendance at medical deposition" stage through your firm's billing system.





c. Since this stage is "Line 5", the "Line-item Description" field in your firm's billing system must have the prefix of "[S5]" as shown below.

Date	TKID	Description	Unit	Amount
04/03/17	AA	[S5] Attend medical deposition of Plaintiff A	1.0	50.00

d. A line-item with a missing or incorrect prefix will cause the invoice to be rejected.

2. Manually Creating an Invoice in CounselLink

- a. Invoices can also be manually entered and submitted directly into CounselLink. In CounselLink, you will be prompted to select the stage you want to bill against. There is no need to use the "internal CounselLink" stage prefix in the "Line-item Description" as the description will prefill based on the stage selected.
- **b.** Using the above "4498" Flat Fee Task Based Fee Structure example, you can choose to bill against "Line 5" for the "L330 Attendance at medical deposition" stage in CounselLink as shown below:



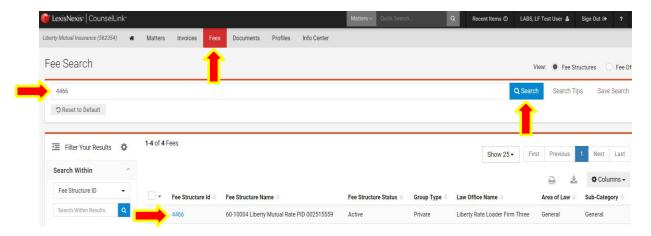
Hybrid Task Based Billing

The Hybrid Task based billing arrangement is handled in CounselLink through "Stages." These stages are defined for each Fee Structure that is assigned to each matter. The first stage is created for "Detailed Hourly" with hourly rates for each timekeeper level. Additional stages are created for each distinct task

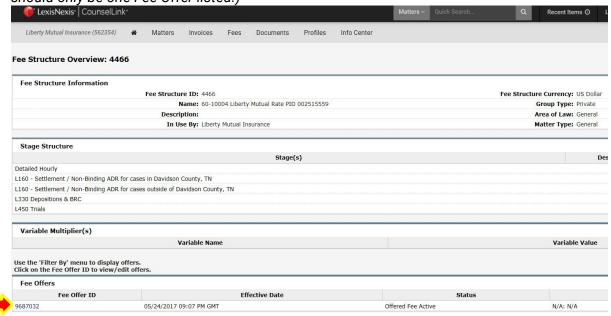


with a specific flat fee rate. In the example below, we will use the CounselLink Fee Structure ID of '4466' which has a Hybrid Task based billing fee structure type. To view this fee structure, follow the steps listed below:

- 1. Click on the "Fees" menu tab item on top of the CounselLink page.
 - a. Enter "4466" on the Search field.
 - b. Click the "Search" button.
 - c. After the search results are returned, click on the "4466" Fee Structure ID link to view the "Fee Structure Overview" page.

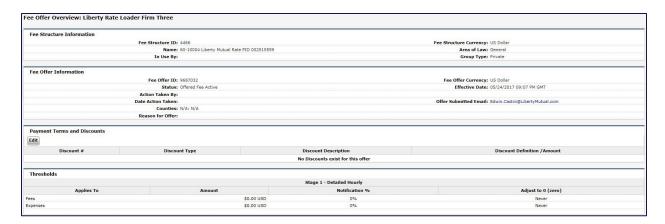


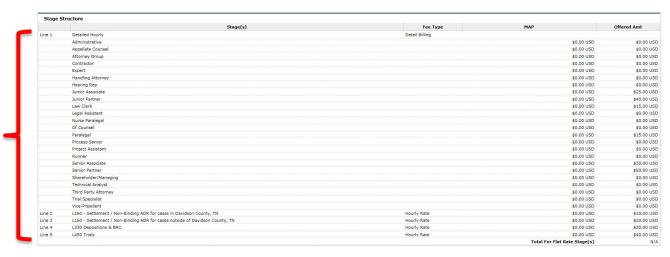
2. From the "Fee Structure Overview" page, locate the "Fee Offers" section at the bottom of the page and click on the "Fee Offer ID" link to display the "Fee Offer Overview" page. (NOTE: There should only be one Fee Offer listed.)



3. From the "Fee Offer Overview" page, you will see all the stages associated with the Fee Structure under the "Stage Structure" section shown below:







- **a.** Each line on the "Stage Structure" section represents a stage.
- b. Line1 is always the "Detailed Hourly" stage with hourly rates for each timekeeper level.
- **c.** The following lines are for stages for each distinct task with its associated flat fee rate.
- **d.** In the example above, there are 5 lines referenced. Line 1 references "Detailed Hourly" with the hourly rates for each timekeeper level. Lines 2 through 5 are for the fee rates.
- e. Internally in CounselLink, "Line1" in this example is referred to as the "[S1]" stage, "Line2" is the "[S2]" stage, the "Line3" is the "[S3]" stage, and so forth.
- **f.** You will need to make a note of this **"internal CounselLink"** stage designation as you bill various stages through your firm's billing system as described below.

There are two ways to create and submit invoices for Hybrid Task Based Billing:

1. Using Your Firm's Billing System

- a. Using your firm's billing system, you must properly direct the billing of each invoice line-item to a specific stage of the fee offer. You do this by using the "internal CounselLink" stage designation.
- b. Using the above "4466" Hybrid Task Based Fee Structure example, you may choose to bill some charges against "Line 1" for the "Detailed Hourly" stage and a specific charge to "Line 4" for the "L330 Depositions & BRC" stage through your firm's billing system.

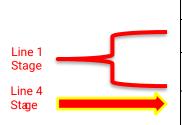




- **c.** Since the "Line 1" stage is always "Detailed Hourly" for all Hybrid Task based fee structures, **no prefix** needs to be entered in your firm's billing system in the "Line-item Description" field. However, for Lines 2 through 5, a prefix in the "Line-item Description" field will be required.
- d. Using the above "4466" Hybrid Task Based Fee Structure example:

The first two entries shown below are for the "Detailed Hourly" stage with no prefix entered in the "Line-item Description" field in your firm's billing system. ii. For third entry shown below, the charge is for the "Line 4" stage. Since this is the fourth stage, the "[S4]" prefix must be entered in the "Line-item Description" field in your firm's billing system.

e. If the "Line-item Description" does not contain the applicable prefix, the **invoice will be rejected.**



Date	TKID	Description	Unit	Amount
04/03/17	AA	Law clerk research	2.0	30.00
04/07/17	BB	Junior Associate prepares pleadings	3.0	75.00
04/20/17	CC	[S4] Conduct deposition of Plaintiff A	1.0	30.00

2. Manually Creating an Invoice in CounselLink

- a. Invoices can also be manually entered and submitted directly into CounselLink. In CounselLink, you will be prompted to select the stage you want to bill against. There is no need to use the "internal CounselLink" stage prefix in the "Line-item Description" as the description will prefill based on the stage selected.
- Using the above "4466" Hybrid Task Based Fee Structure example, you may choose to bill against the "Detailed Hourly" and the "L330 Depositions &
- Under "Detailed Hourly" stage line, the firm should bill all hourly time using the appropriate UTMBS codes and units for that time.





d. Under the **"L330 Depositions & BRC"** stage, the firm should bill against the agreed upon flat fee rate for a "Depositions and BRC."

