

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.

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Liberty Mutual Insurance (562354) Matters Invoices **Fees** Documents Profiles Info Center

Fee Search View

4498 Search

Reset to Default

Filter Your Results 1-4 of 4 Fees Show 25 First

Search Within

Fee Structure ID

Search Within Results

Fee Structure ID	Fee Structure Name	Fee Structure Status	Group Type	Law Office Name
4498	60-10034 Liberty Mutual Rate PID 002522362	Active	Private	Liberty Rate Loader Firm Three

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.)

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Liberty Mutual Insurance (562354) Matters Invoices **Fees** Documents Profiles Info Center

Fee Structure Overview: 4498

Fee Structure Information

Fee Structure ID: 4498
Name: 60-10034 Liberty Mutual Rate PID 002522362
Description:
In Use By: Liberty Mutual Insurance

Stage Structure

Stage(s)
L110 Lay Witness Preparation
L110 Expert Witness Preparation
L190 Preparation of Subpoena
L190 Preparation of judicial subpoena
L330 Attendance at medical deposition
L440 Special Funds Pre-Trial(no concession)
L440 Special Funds Pre-Trial(partial concession)
L440 Special Funds Pre-Trial(full concession)
L450 Attendance at hearing
L450 Attendance at expedited hearing
L450 Attendance at hearing with testimony
L450 Attendance at hearing with testimony of expert or medical doctor

Variable Multiplier(s)

Variable Name

Use the 'Filter By' menu to display offers.
Click on the Fee Offer ID to view/edit offers.

Fee Offers

Fee Offer ID	Effective Date
9687030	05/24/2017 12:52 AM GMT



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

Fee Offer Overview: Liberty Rate Loader Firm Three

Fee Structure Information	
Fee Structure ID: 4498	Fee Structure Currency: US Dollar
Name: 60-10034 Liberty Mutual Rate PID 002522362	Area of Law: General
In Use By:	Group Type: Private
Fee Offer Information	
Fee Offer ID: 9687030	Fee Offer Currency: US Dollar
Status: Offered Fee Active	Effective Date: 05/24/2017 12:52 AM GMT
Action Taken By:	Offer Submitted Email: Edwin.Castro@LibertyMutual.com
Date Action Taken:	
Counties: N/A: N/A	
Reason for Offer:	
Payment Terms and Discounts	
Edit	
Discount #	Discount Type
Discount Description	
Discount Definition /Amount	
No Discounts exist for this offer	
Stage Structure	
	Stage(s)
	Fee Type
	MAP
	Offered Amt
Line 1	L110 Lay Witness Preparation
Line 2	L110 Expert Witness Preparation
Line 3	L190 Preparation of Subpoena
Line 4	L190 Preparation of judicial subpoena
Line 5	L330 Attendance at medical deposition
Line 6	L440 Special Funds Pre-Trial(no concession)
Line 7	L440 Special Funds Pre-Trial(partial concession)
Line 8	L440 Special Funds Pre-Trial(full concession)
Line 9	L450 Attendance at hearing
Line 10	L450 Attendance at expedited hearing
Line 11	L450 Attendance at hearing with testimony
Line 12	L450 Attendance at hearing with testimony of expert or medical doctor
Total For Flat Rate Stage(s)	
N/A	

- Each line on the **"Stage Structure"** section represents a stage.
- In the example above, there are twelve lines or stages each with a distinct stage description and "Offered Amount" or rate.
- 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.
- 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

- 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.
- 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.



Stage Structure				
	Stage(s)	Fee Type	MAP	Offered Amt
Line 1	L110 Lay Witness Preparation	Hourly Rate	\$0.00 USD	\$10.00 USD
Line 2	L110 Expert Witness Preparation	Hourly Rate	\$0.00 USD	\$20.00 USD
Line 3	L190 Preparation of Subpoena	Hourly Rate	\$0.00 USD	\$30.00 USD
Line 4	L190 Preparation of judicial subpoena	Hourly Rate	\$0.00 USD	\$40.00 USD
Line 5	L330 Attendance at medical deposition	Hourly Rate	\$0.00 USD	\$50.00 USD
Line 6	L440 Special Funds Pre-Trial(no concession)	Hourly Rate	\$0.00 USD	\$60.00 USD
Line 7	L440 Special Funds Pre-Trial(partial concession)	Hourly Rate	\$0.00 USD	\$70.00 USD
Line 8	L440 Special Funds Pre-Trial(full concession)	Hourly Rate	\$0.00 USD	\$80.00 USD
Line 9	L450 Attendance at hearing	Hourly Rate	\$0.00 USD	\$90.00 USD
Line 10	L450 Attendance at expedited hearing	Hourly Rate	\$0.00 USD	\$100.00 USD
Line 11	L450 Attendance at hearing with testimony	Hourly Rate	\$0.00 USD	\$110.00 USD
Line 12	L450 Attendance at hearing with testimony of expert or medical doctor	Hourly Rate	\$0.00 USD	\$120.00 USD
Total For Flat Rate Stage(s)				N/A

- 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:

☐	Date	Timekeeper	Code	Description	Units	Rate (USD)	Amount (USD)	Client Adj. (USD)	Inv. Adj. (USD)	Tax (USD)	Net (USD)
☐				Stage: L110 Lay Witness Preparation		Stage Rate: \$10.00 USD					
☐				Stage: L110 Expert Witness Preparation		Stage Rate: \$20.00 USD					
☐				Stage: L190 Preparation of Subpoena		Stage Rate: \$30.00 USD					
☐				Stage: L190 Preparation of judicial subpoena		Stage Rate: \$40.00 USD					
☐				Stage: L330 Attendance at medical deposition		Stage Rate: \$50.00 USD					
☒	04/03/2017	None	None	L330 Attendance at medical deposition	1	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00
☐				Stage: L440 Special Funds Pre-Trial(no concession)		Stage Rate: \$60.00 USD					
☐				Stage: L440 Special Funds Pre-Trial(partial concession)		Stage Rate: \$70.00 USD					
☐				Stage: L440 Special Funds Pre-Trial(full concession)		Stage Rate: \$80.00 USD					
☐				Stage: L450 Attendance at hearing		Stage Rate: \$90.00 USD					
☐				Stage: L450 Attendance at expedited hearing		Stage Rate: \$100.00 USD					
☐				Stage: L450 Attendance at hearing with testimony		Stage Rate: \$110.00 USD					
☐				Stage: L450 Attendance at hearing with testimony of expert or medical doctor		Stage Rate: \$120.00 USD					

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.

Fee Search

4466

Search

1-4 of 4 Fees

Fee Structure ID	Fee Structure Name	Fee Structure Status	Group Type	Law Office Name	Area of Law	Sub-Category
4466	60-10004 Liberty Mutual Rate PID 002515559	Active	Private	Liberty Rate Loader Firm Three	General	General

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.)

Fee Structure Overview: 4466

Fee Structure Information

Fee Structure ID: 4466

Name: 60-10004 Liberty Mutual Rate PID 002515559

Description: In Use By: Liberty Mutual Insurance

Fee Structure Currency: US Dollar

Group Type: Private

Area of Law: General

Matter Type: General

Stage Structure

Stage(s)

Detailed Hourly

L160 - Settlement / Non-Binding ADR for cases in Davidson County, TN

L160 - Settlement / Non-Binding ADR for cases outside of Davidson County, TN

L330 Depositions & BRC

L450 Trials

Variable Multiplier(s)

Variable Name

Variable Value

Use the 'Filter By' menu to display offers.
Click on the Fee Offer ID to view/edit offers.

Fee Offers

Fee Offer ID	Effective Date	Status	
9687032	05/24/2017 09:07 PM GMT	Offered Fee Active	N/A: N/A

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:



Fee Offer Overview: Liberty Rate Loader Firm Three

Fee Structure Information Fee Structure ID: 4466 Name: 60-10004 Liberty Mutual Rate PID 002515559 In Use By:		Fee Structure Currency: US Dollar Area of Law: General Group Type: Private												
Fee Offer Information Fee Offer ID: 9687032 Status: Offered Fee Active Action Taken By: Date Action Taken: Counties: N/A; N/A Reason for Offer:		Fee Offer Currency: US Dollar Effective Dates: 05/24/2017 09:07 PM GMT Offer Submitted Email: Edwin.Castro@LibertyMutual.com												
Payment Terms and Discounts Edit <table border="1"> <thead> <tr> <th>Discount #</th> <th>Discount Type</th> <th>Discount Description</th> <th>Discount Definition / Amount</th> </tr> </thead> <tbody> <tr> <td colspan="4">No Discounts exist for this offer</td> </tr> </tbody> </table>			Discount #	Discount Type	Discount Description	Discount Definition / Amount	No Discounts exist for this offer							
Discount #	Discount Type	Discount Description	Discount Definition / Amount											
No Discounts exist for this offer														
Thresholds <table border="1"> <thead> <tr> <th>Applies To</th> <th>Amount</th> <th>Stage 1 - Detailed Hourly</th> <th>Adjust to 0 (zero)</th> </tr> </thead> <tbody> <tr> <td>Fees</td> <td>\$0.00 USD</td> <td>0%</td> <td>Never</td> </tr> <tr> <td>Expenses</td> <td>\$0.00 USD</td> <td>0%</td> <td>Never</td> </tr> </tbody> </table>			Applies To	Amount	Stage 1 - Detailed Hourly	Adjust to 0 (zero)	Fees	\$0.00 USD	0%	Never	Expenses	\$0.00 USD	0%	Never
Applies To	Amount	Stage 1 - Detailed Hourly	Adjust to 0 (zero)											
Fees	\$0.00 USD	0%	Never											
Expenses	\$0.00 USD	0%	Never											

Stage Structure		Stage(s)	Fee Type	HAP	Offered Amt
Line 1	Detailed Hourly		Detail Billing		
	Administrative			\$0.00 USD	\$0.00 USD
	Appellate Counsel			\$0.00 USD	\$0.00 USD
	Attorney Group			\$0.00 USD	\$0.00 USD
	Contractor			\$0.00 USD	\$0.00 USD
	Expert			\$0.00 USD	\$0.00 USD
	Handling Attorney			\$0.00 USD	\$0.00 USD
	Hearing Rep			\$0.00 USD	\$0.00 USD
	Junior Associate			\$0.00 USD	\$25.00 USD
	Junior Partner			\$0.00 USD	\$40.00 USD
	Law Clerk			\$0.00 USD	\$15.00 USD
	Legal Assistant			\$0.00 USD	\$0.00 USD
	Nurse Paralegal			\$0.00 USD	\$0.00 USD
	Of Counsel			\$0.00 USD	\$0.00 USD
	Paralegal			\$0.00 USD	\$15.00 USD
	Process Server			\$0.00 USD	\$0.00 USD
	Project Assistant			\$0.00 USD	\$0.00 USD
	Runner			\$0.00 USD	\$0.00 USD
	Senior Associate			\$0.00 USD	\$30.00 USD
	Senior Partner			\$0.00 USD	\$50.00 USD
	Shareholder/Managing			\$0.00 USD	\$0.00 USD
	Technical Analyst			\$0.00 USD	\$0.00 USD
	Third Party Attorney			\$0.00 USD	\$0.00 USD
	Trial Specialist			\$0.00 USD	\$0.00 USD
	Vice-President			\$0.00 USD	\$0.00 USD
Line 2	L160 - Settlement / Non-Binding ADR for cases in Davidson County, TN		Hourly Rate	\$0.00 USD	\$10.00 USD
Line 3	L160 - Settlement / Non-Binding ADR for cases outside of Davidson County, TN		Hourly Rate	\$0.00 USD	\$20.00 USD
Line 4	L330 Depositions & BRC		Hourly Rate	\$0.00 USD	\$30.00 USD
Line 5	L450 Trials		Hourly Rate	\$0.00 USD	\$40.00 USD
Total For Flat Rate Stage(s)					N/A

- Each line on the “**Stage Structure**” section represents a stage.
- Line1 is always the “**Detailed Hourly**” stage with hourly rates for each timekeeper level.
- The following lines are for stages for each distinct task with its associated flat fee rate.
- 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.
- 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.
- 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

- 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.
- 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.



Stage Structure				
	Stage(s)	Fee Type	MAP	Offered Amt
Line 1	Detailed Hourly	Detail Billing		
	Administrative			\$0.00 USD
	Appellate Counsel			\$0.00 USD
	Attorney Group			\$0.00 USD
	Contractor			\$0.00 USD
	Expert			\$0.00 USD
	Handling Attorney			\$0.00 USD
	Hearing Rep			\$0.00 USD
	Junior Associate			\$0.00 USD
	Junior Partner			\$25.00 USD
	Law Clerk			\$0.00 USD
	Legal Assistant			\$0.00 USD
	Nurse Paralegal			\$0.00 USD
	Of Counsel			\$0.00 USD
	Paralegal			\$0.00 USD
	Process Server			\$0.00 USD
	Project Assistant			\$0.00 USD
	Runner			\$0.00 USD
	Senior Associate			\$0.00 USD
	Senior Partner			\$30.00 USD
	Shareholder/Managing			\$50.00 USD
	Technical Analyst			\$0.00 USD
	Third Party Attorney			\$0.00 USD
	Trial Specialist			\$0.00 USD
	Vice-President			\$0.00 USD
Line 2	L160 - Settlement / Non-Binding ADR for cases in Davidson County, TN	Hourly Rate		\$0.00 USD
Line 3	L160 - Settlement / Non-Binding ADR for cases outside of Davidson County, TN	Hourly Rate		\$0.00 USD
Line 4	L330 Depositions & BRC	Hourly Rate		\$0.00 USD
Line 5	L450 Trials	Hourly Rate		\$0.00 USD
Total For Flat Rate Stage(s)				N/A

- 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**.

Line 1
Stage

Line 4
Stage

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.
- b. Using the above “4466” Hybrid Task Based Fee Structure example, you may choose to bill against the “**Detailed Hourly**” and the “**L330 Depositions &**
- c. Under “**Detailed Hourly**” stage line, the firm should bill all hourly time using the appropriate UTMBs codes and units for that time.



☐	Date	Timekeeper	Code	Description	Units	Rate (USD)	Amount (USD)	Client Adj. (USD)	Inv. Adj. (USD)	Tax (USD)	Net (USD)
☐				Stage: Detailed Hourly	5		\$105.00	\$0.00	\$0.00	\$0.00	\$105.00
	04/03/2017	None, None	L330/NO100	Law clerk research	2	\$15.00	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00
☐	04/07/2017	L330 LP Test User	L210/NO100	Junior Associate prepares pleadings	2	\$37.50	\$75.00	\$0.00	\$0.00	\$0.00	\$75.00
☐				Stage: L160 - Settlement / Non-Binding ADR for cases in Davidson County, TN		Stage Rate:	\$10.00 USD				
☐				Stage: L160 - Settlement / Non-Binding ADR for cases outside of Davidson County, TN		Stage Rate:	\$20.00 USD				
☐				Stage: L330 Depositions & BRC		Stage Rate:	\$30.00 USD				
	05/02/2017	None	None	L330 Depositions & BRC	1	\$30.00	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00
☐				Stage: L450 Trials		Stage Rate:	\$40.00 USD				

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

