



BillerAssist

LEDES Edition

EffortlessLegal

BillerAssist LEDES Edition Summary

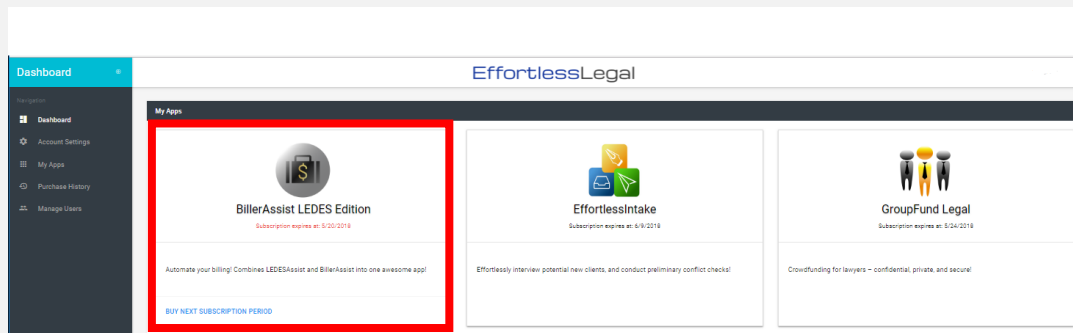
- Easily and automatically connects with your existing billing software.
- Predicts what your time entry will be as you type it.
- Adds powerful features that will speed up your billing.
- Makes your existing billing software smarter, easier and more accurate.
- Invite lawyers not with your firm (Local Counsel) to log time for your clients.
- Automatically applies UTBMS codes to time and expense entries.
- Learns and grows smarter from use, learns your unique billing needs.
- Automates your billing review process.
- Suggests accurate descriptions of work.
- Standardizes UTBMS coding, to make the codes useful.
- Assisted Billing helps with billing review by flagging bills with potential issues.
- Requires no installation.
- Remembers approved billing and uses artificial intelligence to improve billing.
- Can be used with any billing system and even proprietary billing systems.
- Enables users to invite Local Counsel to log time and expense entries for particular matters.
- No need to migrate your data.
- Can be customized for specific billing systems, even proprietary billing systems.
- Local Counsel entries can be easily added to their own billing.
- Alerts for billing that appears to be over billed or under billed.
- Alerts for non-standard billing entries or entries that appear to be incorrect.
- Standardizes text descriptions to make your bills clean and professional.

Overview

- Clients/Matters
- Billing Entries
- Billing Rates
- Settings

Where to Begin

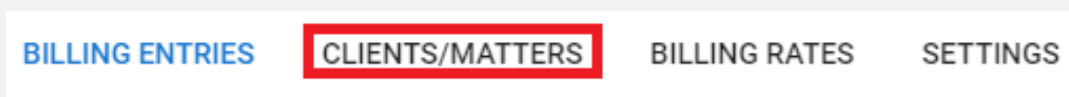
BillerAssist LEDES Edition is launched from the EffortlessLegal dashboard. To begin, you'll need to sign up with an account, and can then log in to the dashboard from the EffortlessLegal homepage. Input your credentials, and you will be directed to the dashboard as shown below. Select BillerAssist LEDES Edition, or purchase the app if you have not done so already. If you would like to learn more on how to create an account with EffortlessLegal, [click here!](#)



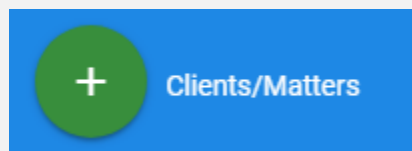
Adding a Client/Matter to BillerAssist LEDES Edition

In order to be able to create time/expense entries, a client and matter are needed. First, a client must be created, then a matter.

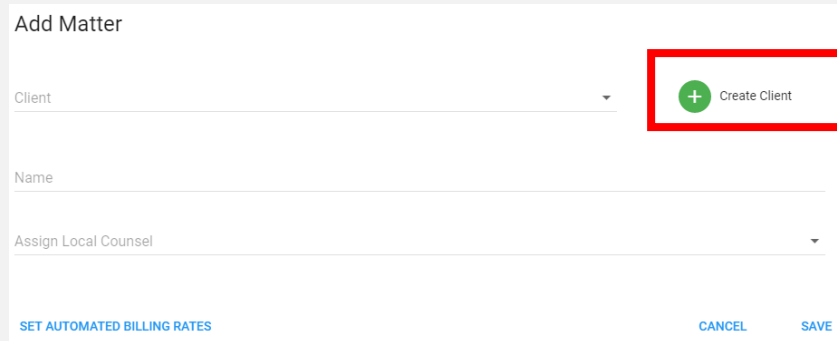
1. To add a client, click the “Clients/Matters” tab on the navigation bar on the top right.



2. Click the large green “+” button on the top left. This will open the create matter window.

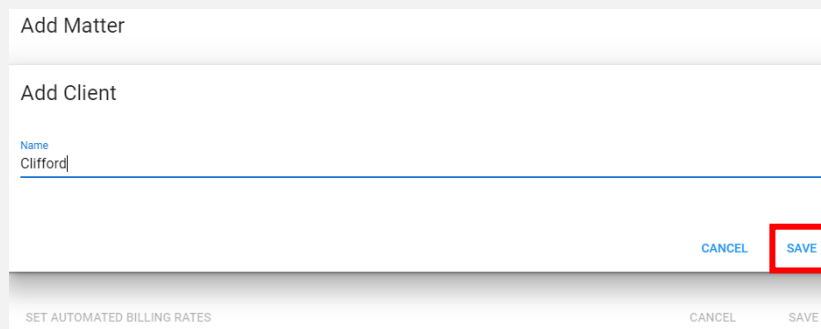


3. Clicking the plus sign will prompt a little window to pop-up. You will have to have pop-ups enabled if they are not already. Click the green “+” button again, this time on the top right. And another window will pop up.



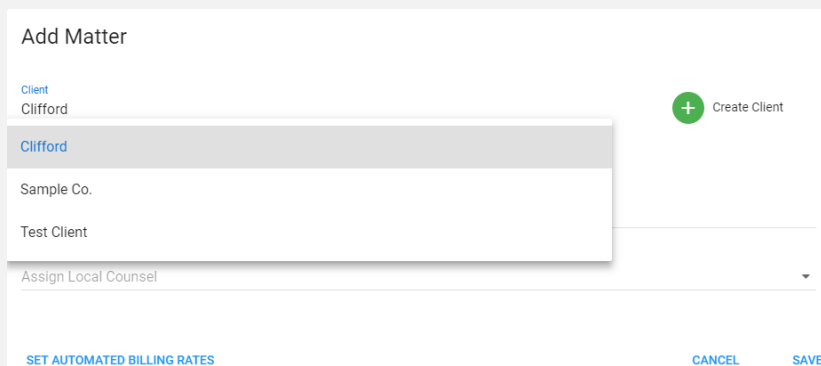
The screenshot shows the 'Add Matter' form. At the top right, there is a green circular button with a white plus sign and the text 'Create Client'. This button is enclosed in a red rectangular box. Below the button are several input fields: 'Client' (a dropdown menu), 'Name' (a text input field), and 'Assign Local Counsel' (a dropdown menu). At the bottom of the form, there are three buttons: 'SET AUTOMATED BILLING RATES' on the left, and 'CANCEL' and 'SAVE' on the right.

Enter the name of the client here, then click “Save.” You will learn how to assign automated billing rates later in the user guide.



The screenshot shows the 'Add Client' form. It has a 'Name' input field containing the text 'Clifford'. At the bottom right of the form, there are two buttons: 'CANCEL' and 'SAVE'. The 'SAVE' button is highlighted with a red rectangular box. At the bottom of the form, there are three buttons: 'SET AUTOMATED BILLING RATES' on the left, and 'CANCEL' and 'SAVE' on the right.

4. Now that the Client has been created, it will autofill into the “Add Matter” popup seen previously. Now you can add the appropriate name to the matter that corresponds to the client. If you have other existing Clients, you can also select them in the dropdown menu.



The screenshot shows the 'Add Matter' form with a dropdown menu open under the 'Client' field. The dropdown menu lists four options: 'Clifford' (which is highlighted in blue), 'Sample Co.', and 'Test Client'. The 'Create Client' button is still visible at the top right. At the bottom of the form, there are three buttons: 'SET AUTOMATED BILLING RATES' on the left, and 'CANCEL' and 'SAVE' on the right.

In this example, we'll add a matter named "Martin" for our client Clifford. Then click "Save."

The screenshot shows the 'Add Matter' form. The 'Client' dropdown is set to 'Clifford'. The 'Name' field contains 'Martin'. The 'Assign Local Counsel' dropdown is empty. At the bottom right, the 'SAVE' button is highlighted with a red box.

Creating a Billing Entry using BillerAssist LEDES Edition

Once "Clients/Matters" have been created, you will see the top section where billing entries can be formed.

The screenshot shows the 'Billing Entries' form in the BillerAssist LEDES Edition interface. The 'BILLING ENTRIES' tab is highlighted in the top navigation bar. The form includes fields for Date of Entry (05/14/2018), Time (0 mins), Timekeeper, Client, Matter, A-code, A-Descr, T-code, T-Descr, and Description of Work. The 'SAVE + CLEAR' button is highlighted in green.

For "Billing Entries," the following fields must be filled out to complete an entry:

- Date of Entry
- Time
- Timekeeper
- Client
- Matter
- Description of Work

1. If the Billing Entries section is minimized, click the little “^” button in the top left corner.
2. Fill out the time and date; the date will automatically populate to today’s date.
3. Select whether the entry is a “Time Entry” or “Expense Entry” using the toggle button on the left.

The screenshot shows the top section of the 'Billing Entries' form. A blue header bar contains the text 'Billing Entries' with an upward arrow icon, a toggle switch for 'Time entry' (which is currently turned on and highlighted with a red box), a timer icon showing '00:00:00', and an 'APPLY' button. Below the header, the 'Date of Entry' is set to '04/27/2018' and the 'Time (0 mins)' input field is empty.

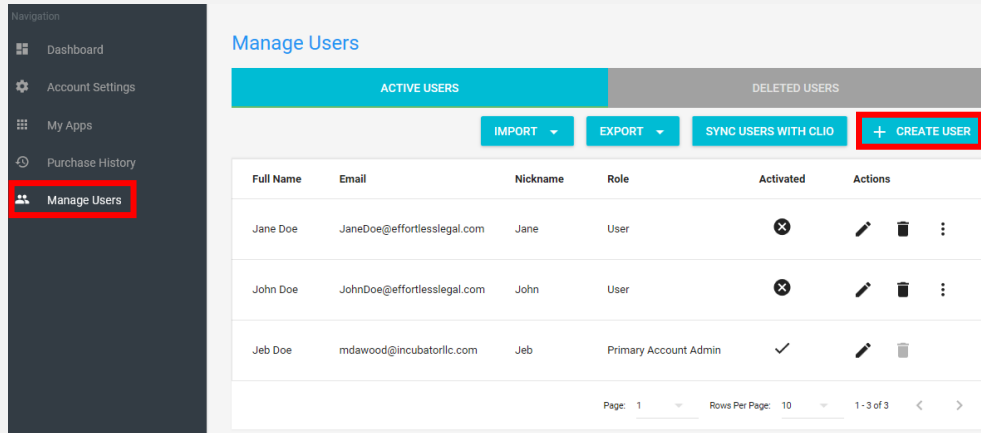
4. If you are entering a “Time Entry” enter the time spent in the “Time” input box. Time Spent is accepted in 0.1 increments (tenths of an hour).

The first screenshot shows the 'Billing Entries' form with the 'Time entry' toggle selected and highlighted. The timer icon and 'APPLY' button are also highlighted with red boxes. The 'Time (0 mins)' input field is highlighted with a red box.

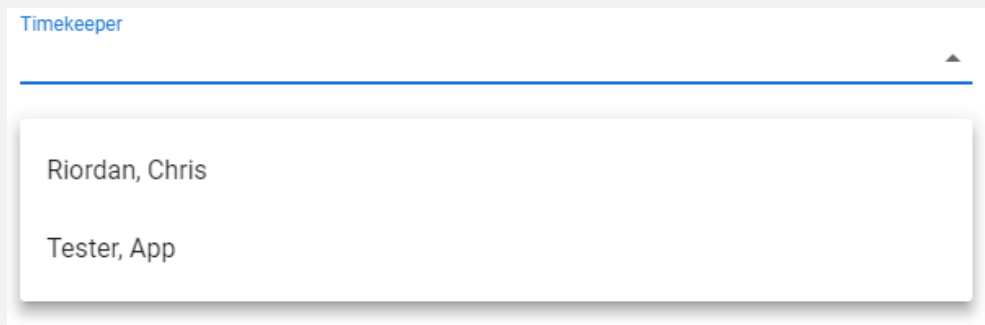
The second screenshot shows the 'Billing Entries' form with the 'Expense entry' toggle selected and highlighted. The 'Unit Price' and 'Quantity' input fields are highlighted with a red box. The 'TOTAL' column shows '\$ 0'.

- The Time can be entered manually, or by using the timer on the top right of the Billing Entries Bar.
- To use the timer, press the play button. When finished, you may click the pause button, and click “Apply,” and the time automatically populates in the input box.

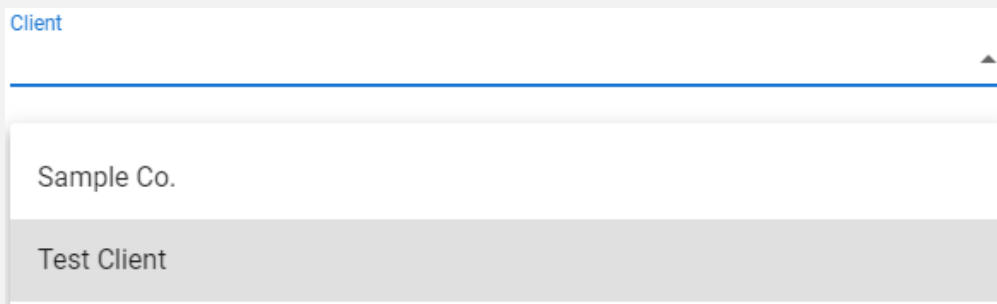
- To add a Timekeeper, go to the dashboard and select “Manage Users.” Select “Create User” and enter the user’s information required to create a new User/Timekeeper. (Only the [Account Admin](#) can select anyone to be a Timekeeper)



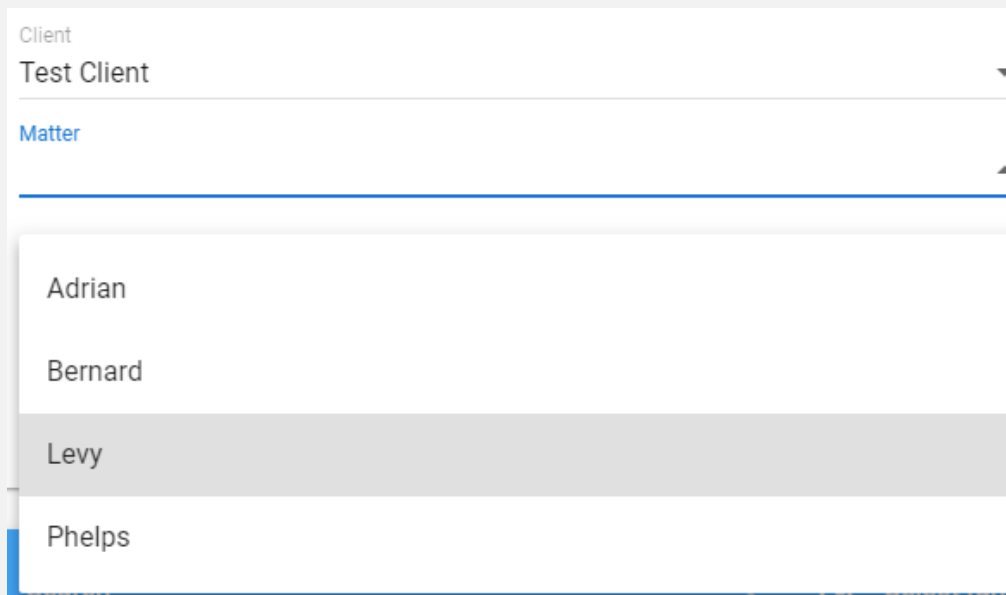
- Timekeepers or Local Counsel are able to select their name once the Account Admin creates a User role.



- Select the client in the dropdown menu named “Client.” In this example, we will select “Test Client.”

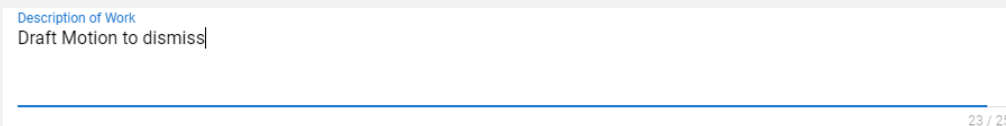


8. Select the correct matter that you would like to bill the time for by selecting the name of the matter in the dropdown menu. In the example, we pick “Levy.”



The screenshot shows a web form with two dropdown menus. The first menu is labeled "Client" and has "Test Client" selected. The second menu is labeled "Matter" and has a list of names: Adrian, Bernard, Levy, and Phelps. The "Levy" option is highlighted with a grey background, indicating it is the selected item.

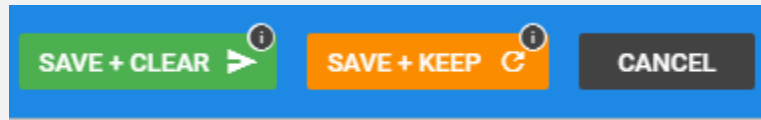
9. The last field is the Description of Work. Here you will type in a description of the work done for the matter. BillerAssist LEDES Edition will start suggesting text descriptions through auto-fill based on what is being typed. Artificial intelligence learns from the your previous entries to predict and automate future entries.



The screenshot shows a text input field for "Description of Work". The text "Draft Motion to dismiss|" is entered. A blue horizontal line is visible below the text, and a small icon of a pencil is in the bottom right corner. The text "23 / 250" is visible in the bottom right corner of the field.

In this example, BillerAssist LEDES Edition picks up that the user is most likely to type in that they are drafting a motion and offers suggestions. If nothing appears, no need to worry! It just means that BillerAssist LEDES Edition may have never seen this type of entry. Thanks to machine learning, BillerAssist LEDES Edition will learn about this type of entry and may appear in the suggestions in the future.





10. Now that all fields are filled out, click “Save + Clear” or “Save+Keep.” The “Save+Clear” Button will save the entry down in the grid, but it will erase all fields in the entry form so that you can start billing for another matter.



Pressing Save+Keep will also save the entry in the grid, except it will not clear the populated fields entered above. If you are billing for the same matter and all you want to change is the time and description of work, you don’t have to go through the other fields again, saving you time!

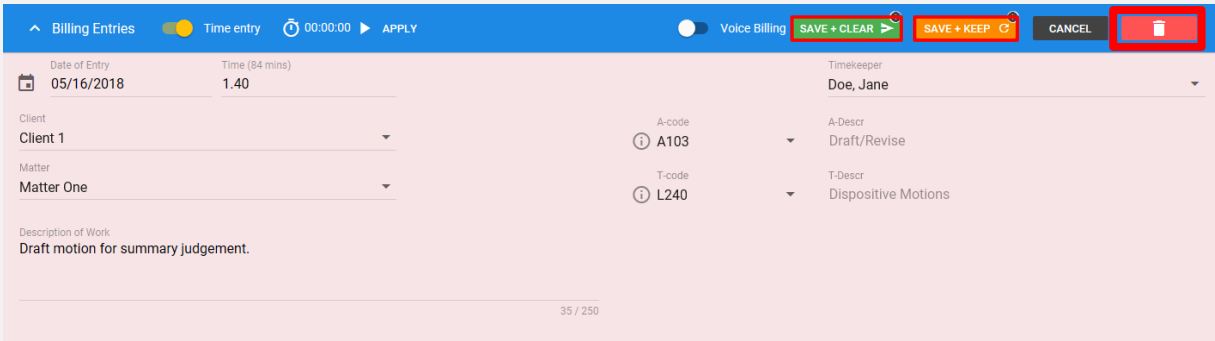
Editing an Entry in BillerAssist LEDES Edition

1. To edit an entry, simply go down to the grid section and find the matter you want to edit.

Date	Type	Amount	Time Keeper	Client	Matter	Description	A-Code	T-Code	
04/27/2018	⌚ Time	13.00 hrs (780 mins)	App Tester	Test Client	Adrian	Draft motion for summary judgement	A103	L240	
04/27/2018	⌚ Time	0.50 hrs (30 mins)	App Tester	Sample Co.	McElroy	Correspondence with client regarding interrogatories.	A106	L390	
04/27/2018	⌚ Time	0.30 hrs (18 mins)	App Tester	Test Client	Adrian	Analyze complaint.	A104	L210	
04/27/2018	⌚ Time	0.50 hrs (30 mins)	App Tester	Test Client	Levy	Draft Motion to dismiss	A103	L240	

Then, press the Pencil button on the right side of the selected matter. Upon clicking, the entry will rise to the top of your screen.

2. The entry you wish to edit will appear in the entry section, and the box will have a red color. You can now edit, or even delete, your entry from this box. To delete the entry, simply click the red button with the trashcan icon.



3. When the edits have been made, simply click “Save+Clear,” or “Save+Keep” to finalize your edits.

Locking Entries in BillerAssist LEDES Edition

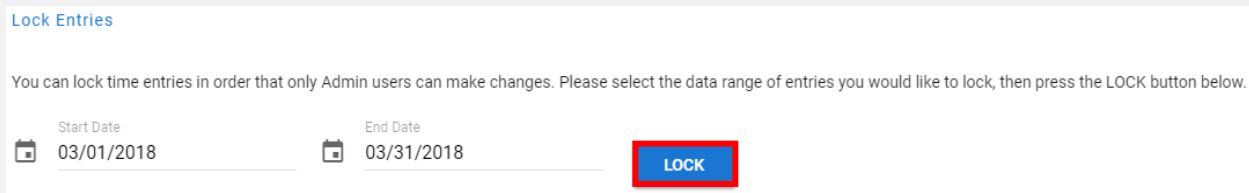
Locking entries in LedesAssist means time entries billed can no longer be edited or deleted. This feature serves as a way to audit across other systems so that an account admin can view billing entries without added users or local counsel editing billing entries.



1. To lock Entries, go to “SETTINGS” on the top right of the browser page.



2. Click “LOCK ENTRIES” on the blue navigation bar.
3. Enter a Start Date and End Date for the time period you would like to lock in. Then press “Lock” to lock the period of time selected.



- At the bottom there will be a “Locked Entries” section that will show what time periods have been locked in. Admin users can unlock the selected time period by pressing the red “DELETE” button on the bottom right.

Locked Entries		
Start Date	End Date	
11/01/2017	11/03/2017	DELETE

- When looking back at the grid, the entries that are locked will not be able to be deleted or edited.

Color Codes in BillerAssist LEDES Edition

Date	Type	Amount	Time Keeper	Client	Matter	Description
12/20/2017	Time	5.00 hrs (300 mins)	Doe, John	DEFAULT	Jones - 0010	Appear for hearing on motion.
12/20/2017	Time	0.40 hrs (24 mins)	Doe, John	DEFAULT	Jones - 0010	analyze appearance
12/20/2017	Time	1.60 hrs (96 mins)	Doe, John	DEFAULT	Jones - 0010	Draft and revise appearance.
12/20/2017	Time	1.00 hrs (60 mins)	Doe, John	DEFAULT	Jones - 0010	Correspondence with client.

You will notice that the time entries will be color coded using BillerAssist LEDES Edition’s artificial intelligence to determine whether time is unreasonable or excessive based on previous billing entries to help predict and automate future entries.

The three colors mean as follows:






– Red: The time being billed is probably unreasonable (Two standard deviations above the norm based on the meta data)

– Yellow: The time being billed is maybe unreasonable (One standard deviation above the norm based on the meta data)

– Green: The time being billed is reasonable

Automated LEDES Coding

1. Once the entry has been saved it will appear below in the grid, where the appropriate LEDES/UTBMS code will be placed upon the entry. The A-Code and T-Code will appear on the right.

Description	A-Code	T-Code	
Shipping expense for documents to client	E124	L140	
Compile exhibits for motion of summary judgement	A103	L240	
Compile exhibits for motion of summary judgement	A103	L240	
Appear for hearing on motion.	A109	L450	
Draft and revise appearance.	A103	L140	

2. If LedesAssist assigns the codes incorrectly, you may edit the entry by clicking the blue pencil button on the right and change it to the correct entry. LedesAssist learns from the manual edits to better assign the correct code the next time using machine learning.

Assigning Billing Rates

Clients and matters can also be assigned specific billing rates. These assigned billing rates can then be assigned to certain users. This way, the export data will show who is billing at what rate, how much a client is to be billed. To assign billing rates:

1. The billing rates first need to be set before users can be assigned. You can set rates by going to the billing rates tab on the top right menu.

BILLING ENTRIES CLIENTS/MATTERS **BILLING RATES** SETTINGS

2. Next, chose the client or matter you want to assign billing rates to. Let's use the new matter we just created, Clifford/Martin. Click the pencil button on the far-right side.

Sample Co.	Osbourne	0	0	0	0	0	0	0	0	
Sample Co.	Jackson	0	0	0	0	0	0	0	0	
Sample Co.	Johnson	0	0	0	0	0	0	0	0	
Clifford	Martin	0	0	0	0	0	0	0	0	
Test Client	All matters	0	0	0	0	0	0	0	0	
Test Client	Bernard	0	0	0	0	0	0	0	0	

3. A window will appear to update the billing rates for the matter you select. Now you can input tiered billing rates as needed (For example, partners may bill more for their time than a senior counsel). Then click "SAVE," to save the billing rate levels.

Update Billing Rates

Client: Clifford - Matter: Martin

Rate Level 1 Rate Level 2 Rate Level 3 Rate Level 4

\$ 350 \$ 300 \$ 250 \$ 0

Rate Level 5 Rate Level 6

\$ 0 \$ 0

[CANCEL](#) [SAVE](#)

4. By clicking the blue people icon shown above, you can assign users to a selected rate level. Here we are assigning the user, "App Tester," to Rate Level 2. Then, click "Save."

NOTICE: Make sure to save the Billing Rate Levels before assigning users.

Update Billing Rates

Assign Users to: Rate Level 2

Assigned Users

Tester, App

[CANCEL](#) [SAVE](#)

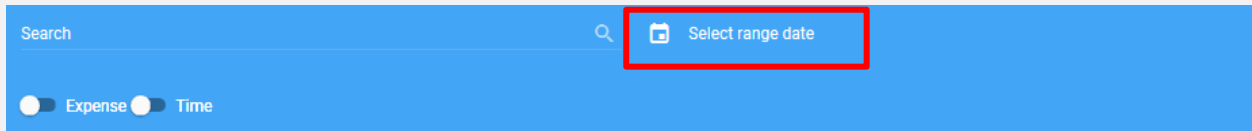
criordan@mauricewutscher.com

[CANCEL](#) [SAVE](#)

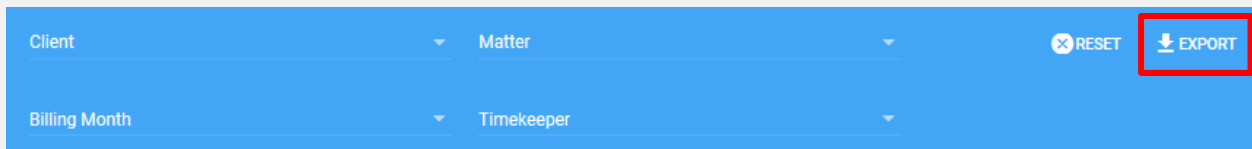
4. Now, whenever “App Tester” bills for this matter, BillerAssist LEDES Edition knows that the user will be billed at rate level 2, or \$300/hr. for Clifford/Martin. This information will not appear on the grid, but upon export, it can be seen that App Tester billed X number of hours doing work Y at a rate of \$300/hr.

Exporting Data

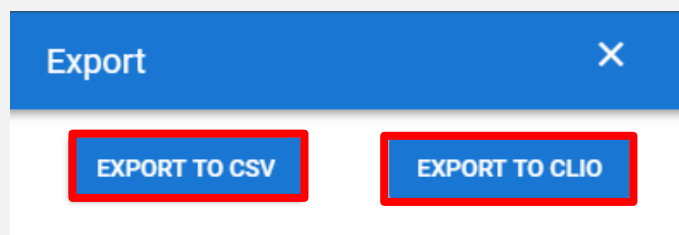
1. Select the range of data that you would like to export. This can be done using the search bar in the Grid by filling out the relevant fields to more easily narrow down the search.



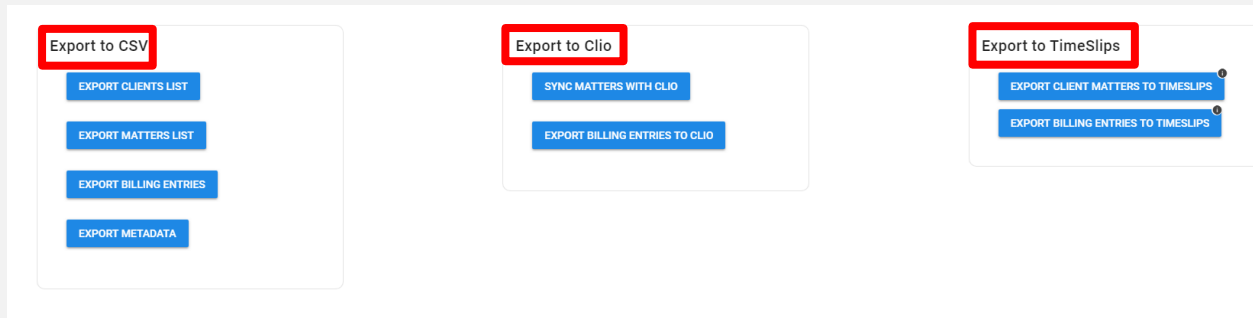
2. The fields will consist of the Search Bar, Billing Month, Start and End Dates, search by Timekeeper, Matter, and/or Client. This can be used to narrow your search. You can also filter entries by time entry or by expense. The results will appear below this search bar in the area called the Grid.
3. Once the appropriate data has been selected, simply click the “Export” button on the right side of the Grid Search bar.



4. A lightbox will appear from the download. All items included within the parameters of the search in the grid will appear in the CSV file. Select “Export to CSV” to download an excel sheet containing any data being pulled, or export to Clio by selecting “Export to Clio.”



5. Other data can be exported by clicking “SETTINGS” and then “Export” on the left. You will see a menu of data that you can export, and whether you want to export the data to a CSV file, or a practice management software such as Clio or TimeSlips.



Conclusion

BillerAssist LEDES Edition helps you automate your billing and coding process to ensure that you save on what you value most – time and money.

Estimate assumes \$375 /hr. average partner billing rate, an average of 10 hours per month per partner, \$250 /hr. average timekeeper billing rate (including paralegals), average of 4 seconds per time or expense entry to use standard drop-down menu selection tools to add UTBMS codes to each entry, average of 250 entries per timekeeper per month. Having a platform that is accessible to multiple users at a firm while enhancing your bottom line propels you ahead of other firms.

BillerAssist LEDES Edition only gets better the more you use it!

Attorneys must exercise “billing judgment,” and “make a good-faith effort” to exclude charges and expenses “that are excessive, redundant, or otherwise unnecessary.”

Hensley v. Eckerhart