BillerAssist

BillerAssist User Guide

Summary

- Computer-Assisted Billing helps with billing by flagging entries with potential issues.
- Requires no installation.
- Automates your billing review process.
- Can be used stand alone or with any billing system and even proprietary billing systems.
- Can be customized for specific billing systems and even proprietary billing systems.
- Invite Local Counsel to log time only for specific clients or matters.
- Local Counsel entries can be easily added to their own billing, and to yours.
- Automates time and expense entries to make billing more accurate.
- Alerts for charges that appear too high.
- Alerts for non-standard billing entries or entries that appear incorrect.
- Remembers approved billing and uses artificial intelligence to improve billing.
- Predicts what your time entry as you type.
- Easily and automatically connects with your existing software.
- Adds features that will speed up your billing.
- Make your existing billing software smarter, easier and more accurate.
- No need to migrate your data.
- Learns and grows smarter with use and learns your unique billing needs.
- Suggests accurate descriptions of work.
- Standardizes text descriptions to make your bills clean and professional.

Overview

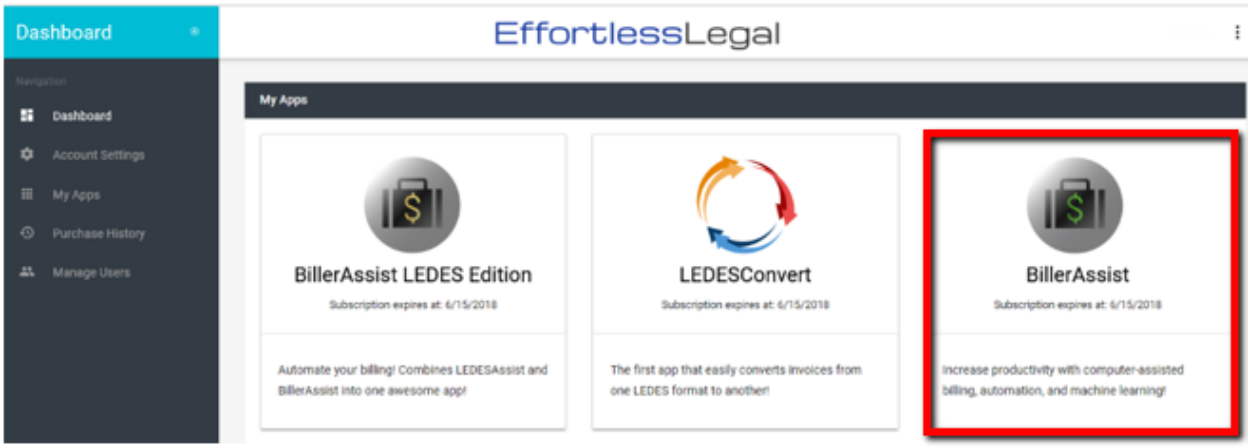
- Get Started
- Import Your Billing Data
- Create Clients and Matters
- Add Billing Entries
- Editing or Deleting a Billing Entry
- Locking Entries
- What the Color Codes Mean
- How to Set Up Metadata
- Assigning Billing Rates
- Exporting Billing Entries
- Integration Bars

Get Started

You can launch BillerAssist from your EffortlessLegal dashboard.

To begin—you will first need to sign-up or log-in to your EffortlessLegal account.

Then, select the BillerAssist application on your Dashboard as shown below.



Import Your Billing Data

You can easily import your billing data – including clients, matters, and billing entries – into BillerAssist.

When you import billing data into BillerAssist, all of the clients, matters, billing entries, billing rates, and users in the imported data will automatically be added and set up in BillerAssist.

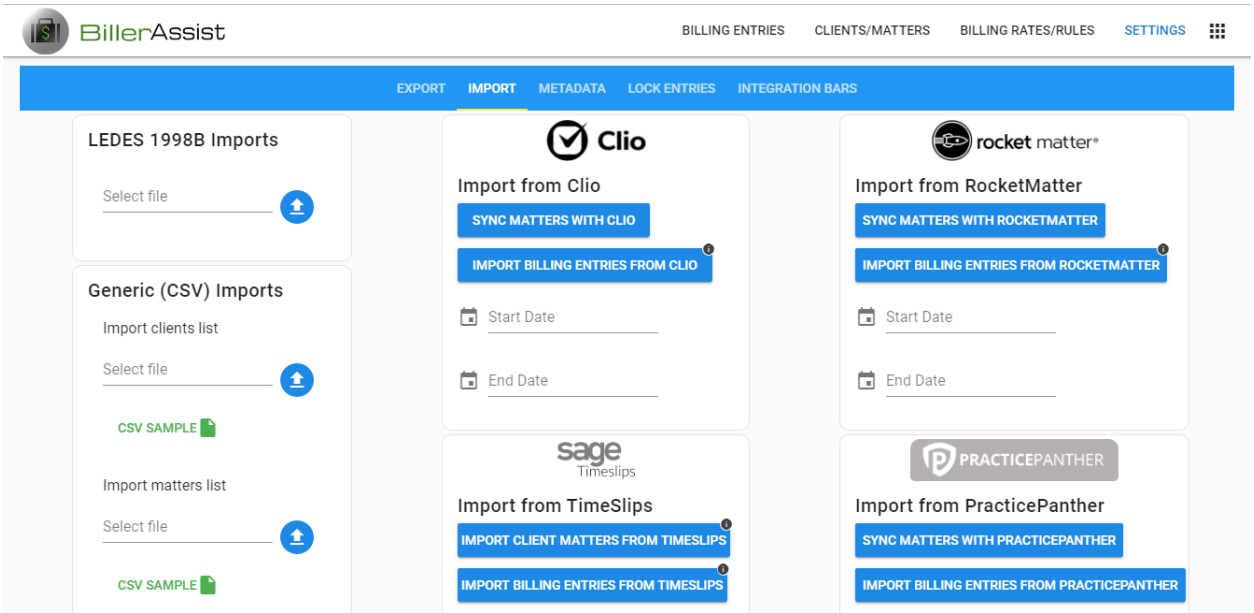
This is the easiest way to get started with BillerAssist.

We support imports of billing data using the following methods:

- **LEDES 1998B**: Import billing data from any billing or practice management system that allows you to export invoices or other billing data into a LEDES 1998B file
- **CSV**: Import billing data from any billing or practice management system that allows you to export invoices or other billing data into a CSV file
- **ActionStep**: Import billing data from ActionStep easily and securely over the internet
- **Clio**: Import billing data from Clio easily and securely over the internet
- **PracticePanther**: Import billing data from PracticePanther easily and securely over the internet
- **Rocket Matter**: Import billing data from Rocket Matter easily and securely over the internet
- **Sage Timeslips**: Import billing data using the "Export to CSV" functionality in Timeslips

Administrator users can import billing data to be used by all users in their company account with BillerAssist.

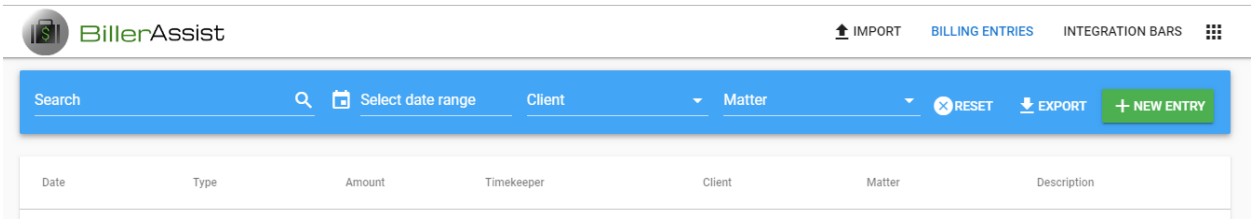
Administrator users should open the "Settings" tab, and click on the "Import" button.



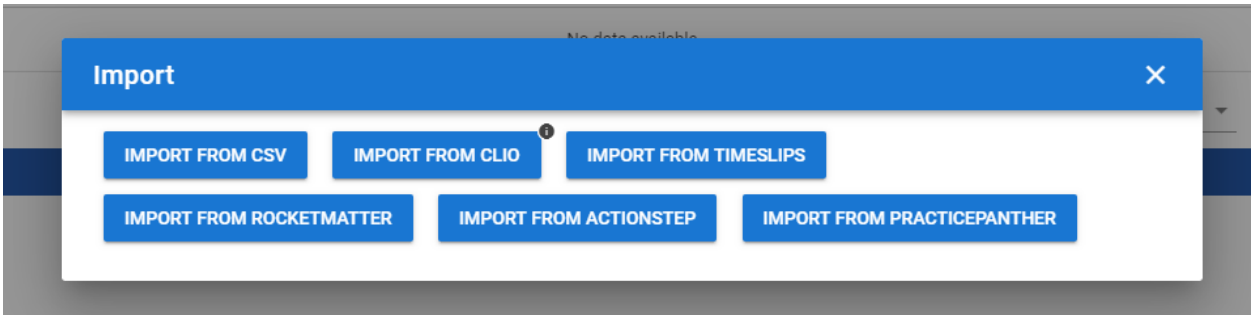
In order to import billing data by CSV, the CSV file must be in a specific format. We provide a "CSV Sample" file demonstrating the precise format that must be used.

If you import data by CSV, you should export billing data from your billing or practice management system into CSV format. Then, you should copy and paste the billing data in the CSV from your billing or practice management system into the columns and rows in the CSV Sample file. Then, you can use the completed CSV to import the data into BillerAssist.

Local Counsel users can also import their billing data into BillerAssist. For this purpose, Local Counsel users will see an "Import" button on the top right.



When a Local Counsel user presses the "Import" button, a popup will appear displaying the various options to import their billing entries into BillerAssist.



Unlike imports that are done by Administrator users, imports by Local Counsel users do not automatically add any clients, matters, billing entries, billing rates, and users to BillerAssist.

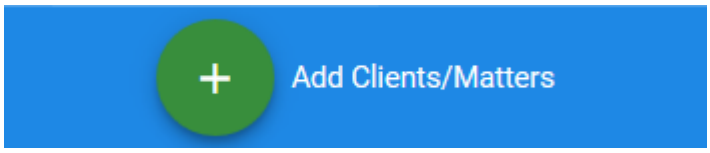
For Local Counsel users, BillerAssist will only accept billing entries for clients and matters that are assigned to the Local Counsel user. All other billing entries will not be imported.

Create Clients and Matters

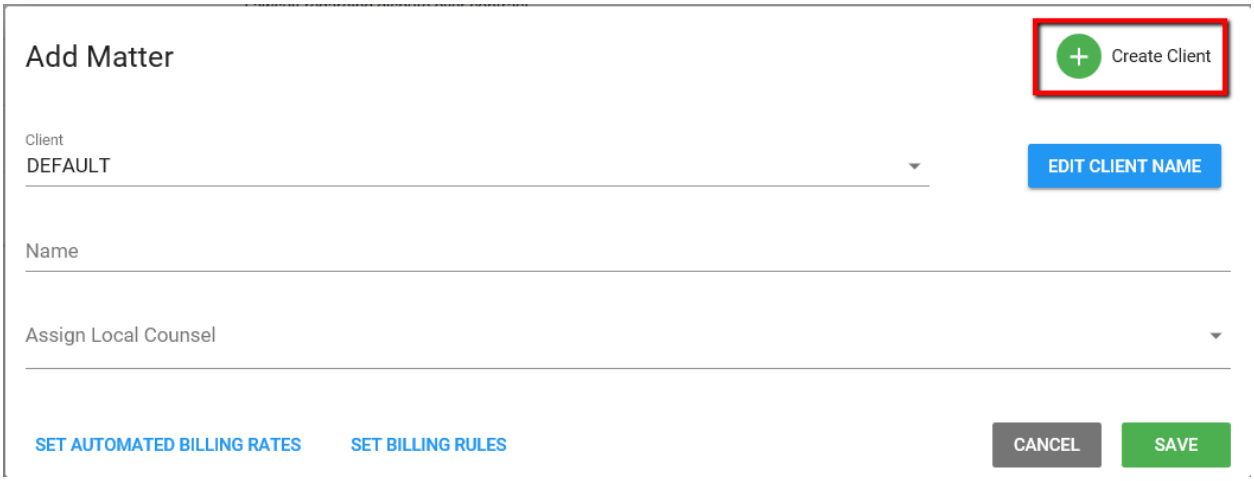
If you did not import billing entries into BillerAssist, you must first create a client and matter before you can create any time or expense entries.

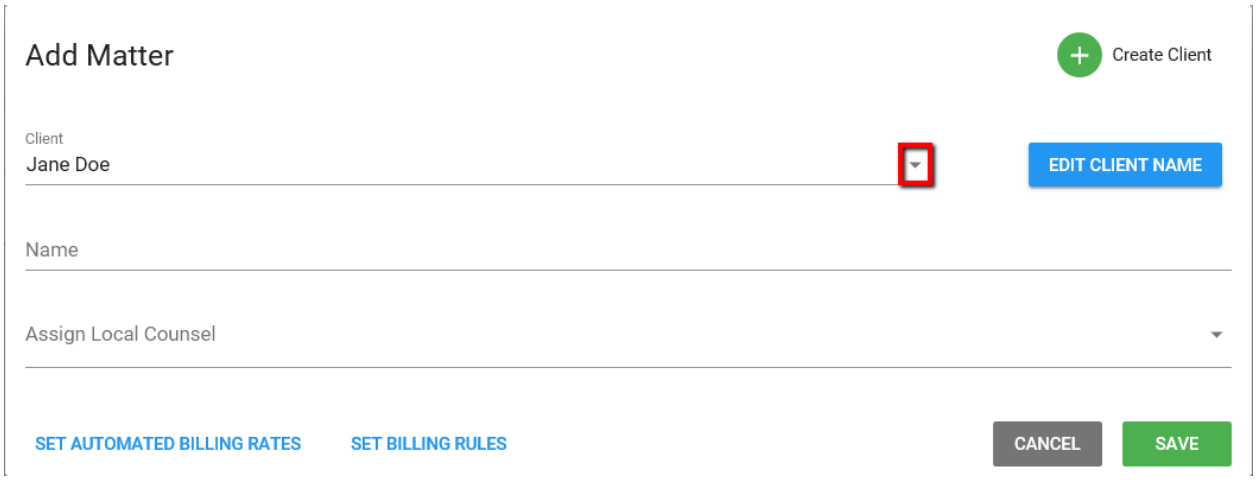
1. To create and add a client, click the "CLIENTS/MATTERS" tab on the navigation bar located at the top right of the page.

2. Click the large green "+" button next to the text that reads "Add Clients/Matters" located on the top right corner of the page.

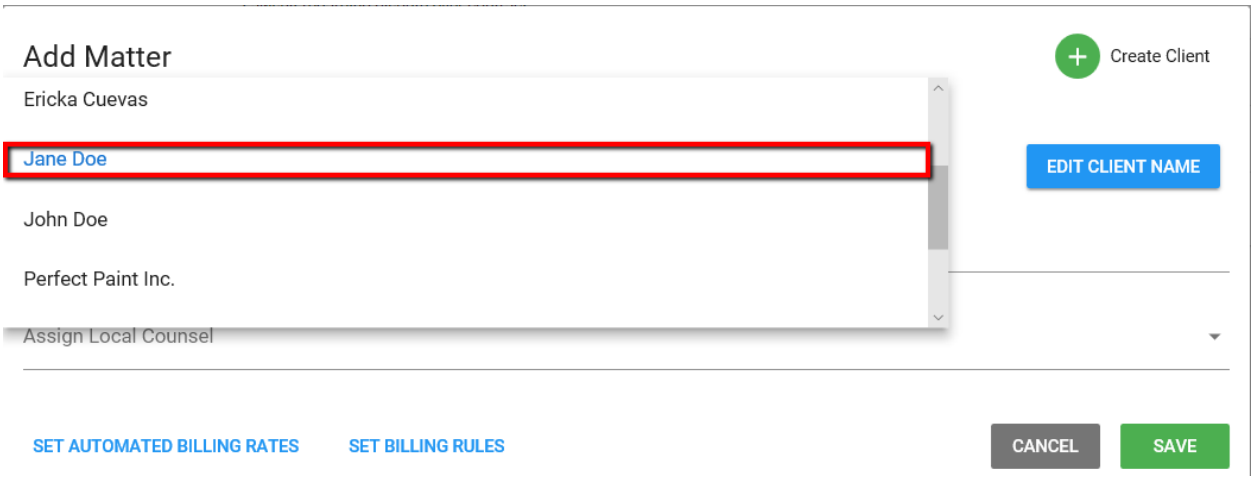


3. Click the small green "+" button located in the "Add Matter" window to create a new client as shown below.

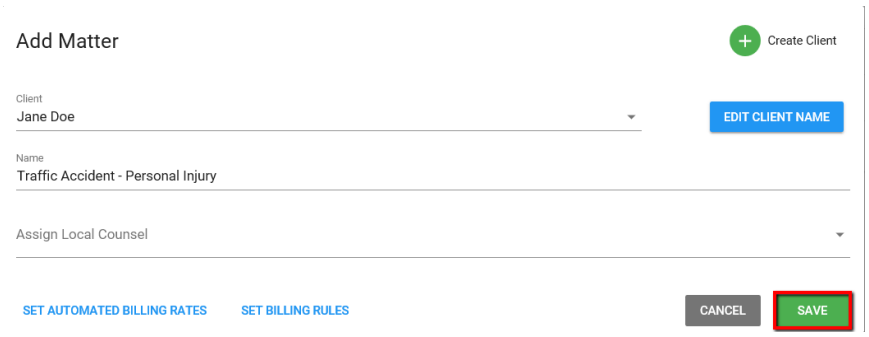




5. Now you can add a matter for a client you created in the "Name" field. The example shows the matter name as "Traffic Accident – Personal Injury" for our client "Jane Doe."



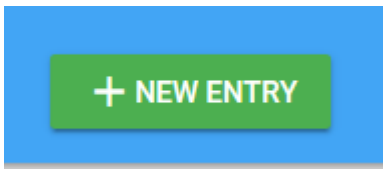
6. Click "SAVE" when finished.



Add Billing Entries

1. To create an add a “Time” and/ or “Expense” bill entry click the “BILLING ENTRIES” tab located at the top right corner of the page.

2. Click the Green “+ NEW ENTRY” button located at the top right corner of the page. A “Billing Entries” window will open.

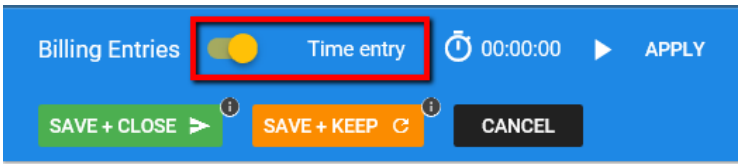


3. Here you have two options to insert billing entries:

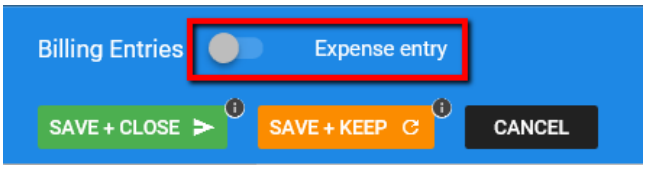
1) Time entry

2) Expense entry

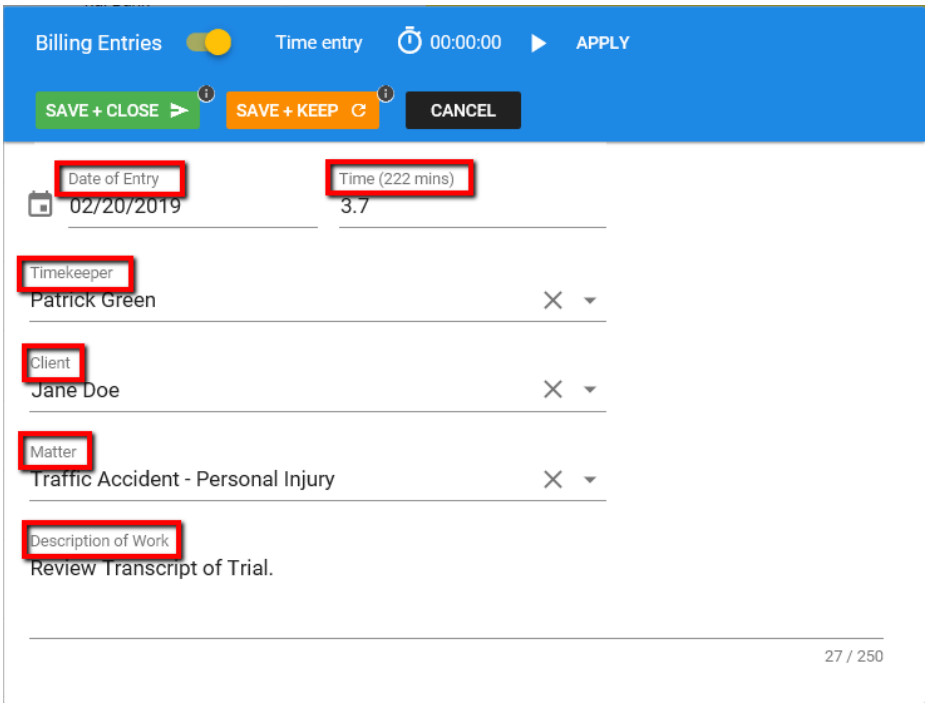
To insert a “Time entry” click the switch button to turn the button yellow to indicate a “Time entry” the as shown in the image below.



To insert an “Expense entry” click the switch button to turn the button grey to indicate an “Expense entry” as shown in the image below.



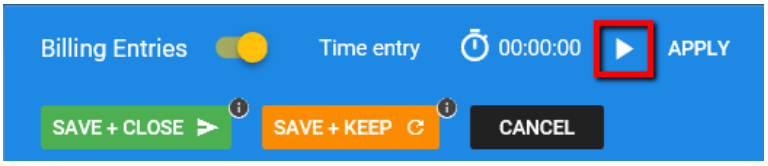
4. To add a “Time entry”, enter the following information in the “Billing Entries” fields as shown below:

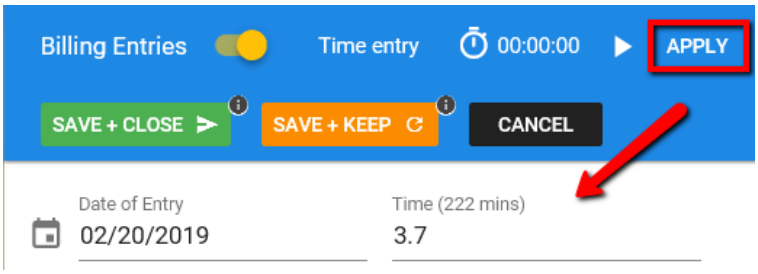


- **NOTE:** The "Time” field can be entered manually, or by using the timer on the top right of the “Billing Entries” window.

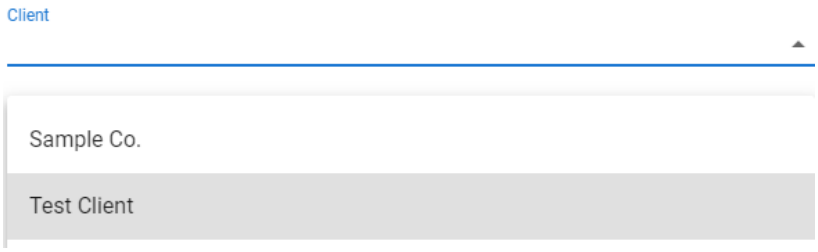
Click the play button to use the time tracker. You can also pause the tracker at any time and resume as you wish. **NOTE:** You must record at least 6 minutes to insert a time entry. Time recorded is accepted in 0.1 increments (tenths of an hour).

Click the “APPLY” button to stop the timer and automatically apply your recorded time to the “Time” field.

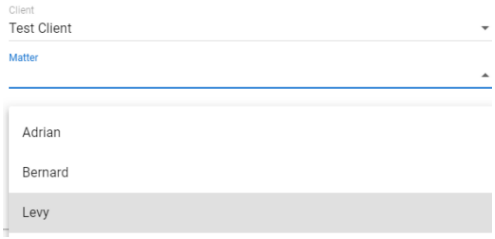




Select the client in the dropdown menu named "Client." In this example, we will select "Test Client."



Select the matter that you would like to use for your entry by selecting the name of the matter in the dropdown menu. In the example below, we pick "Levy."



The last field is the Description of Work. Here you will type in a description of the work done or expense advanced for the matter. BillerAssist will start suggesting text descriptions using auto-fill based on what is being typed.

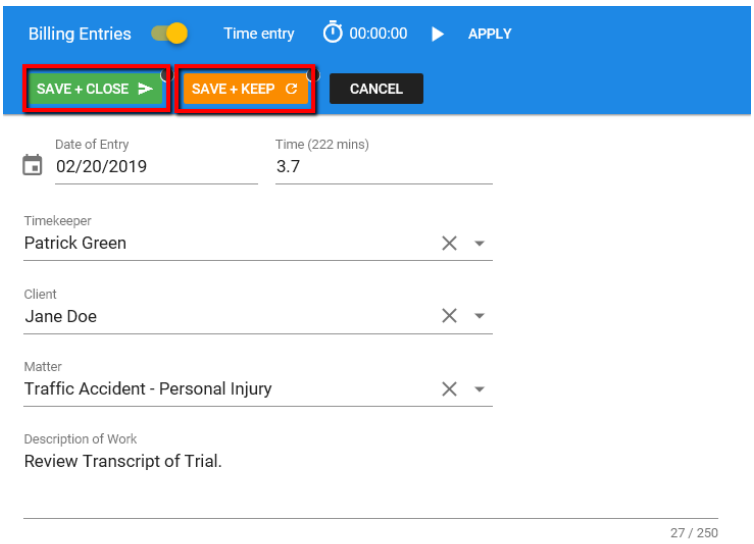
In this example, BillerAssist picks up that the user is most likely to type in that they are drafting a motion and offers suggestions.

If nothing appears, no need to worry! It just means that BillerAssist may have never seen this type of entry. Thanks to machine learning, BillerAssist will learn about this type of entry and it will appear in the suggestions in the future.

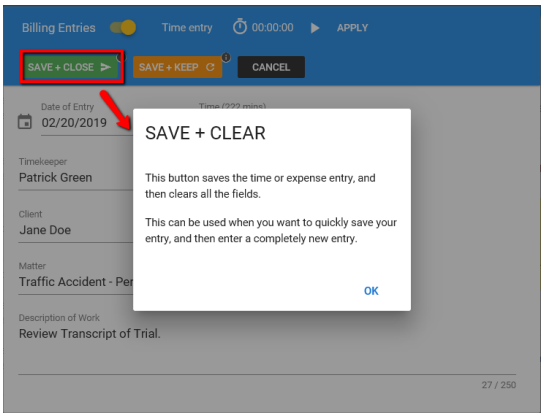
NOTE: When you are ready to save your time entry you have two options:

1) Save and Close

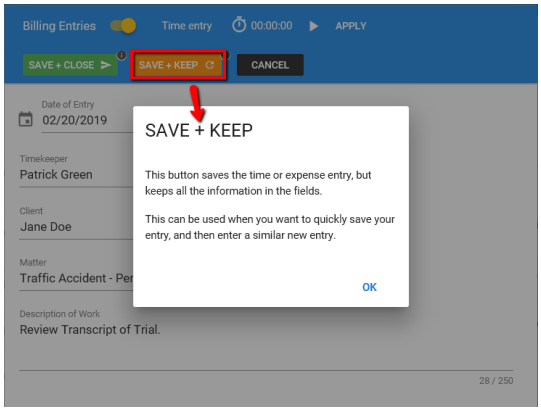
2) Save and Keep



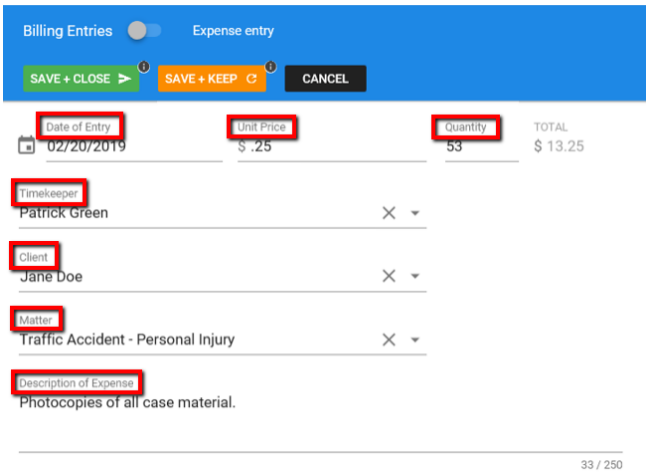
The “Save + Close” button will save the information you inserted into the “Time entry” fields and immediately close the “Billing Entries” window.



The “Save + Keep” button will save the information inserted into the “Expense entry” fields and keeps the “Billing Entries” window open.

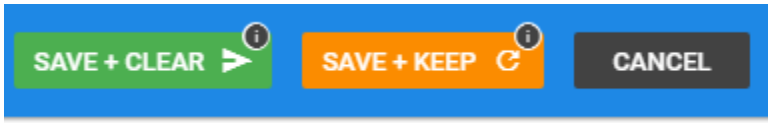


5. To add an “Expense entry” insert the following information in the “Billing Entries” fields as shown below:



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.

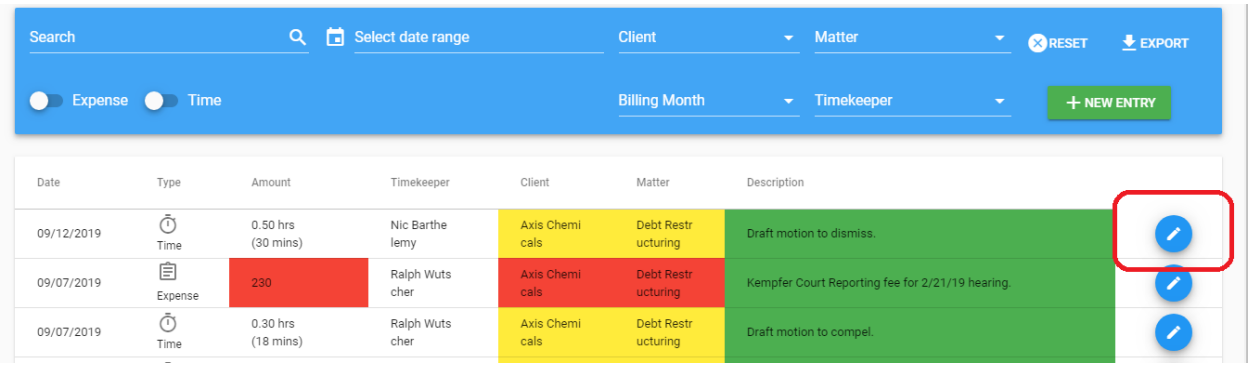


Pressing “SAVE+KEEP” will also save the entry, except it will not clear the populated fields entered above.

If you are billing for the same matter, and all you want to change is the time and description of work for a new entry, you don’t have to go through the other fields again, saving you time!

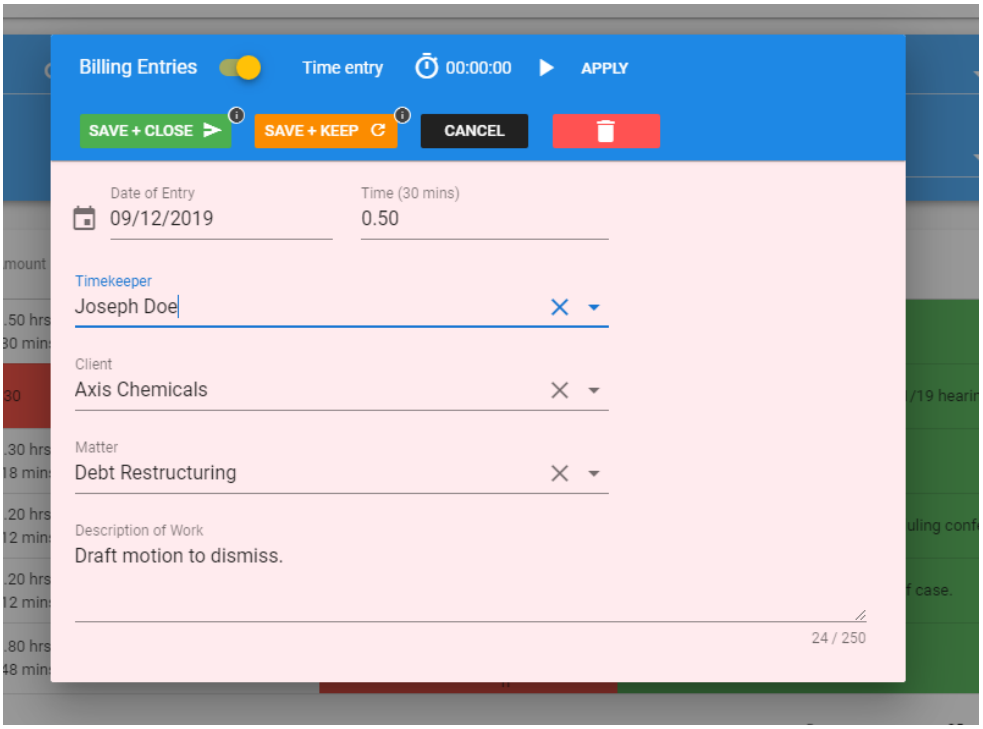
Editing or Deleting a Billing Entry

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

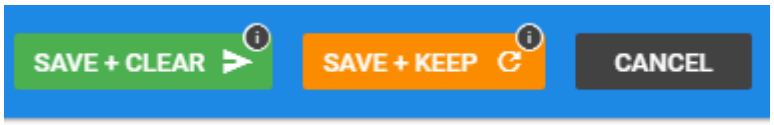


Then, press the blue "pencil" button on the right side. Upon click, the details of the entry will appear in a popup viewer.

2. You can now edit or delete your entry. To delete the entry, simply click the red button with the trashcan icon.



3. You can also edit any part of the entry. When the edits have been made, simply click “SAVE+CLEAR,” or “SAVE+KEEP” to finalize your edits.



Locking Entries

Locking entries in BillerAssist means time entries in the lock period can no longer be edited or deleted by non-Administrator users.

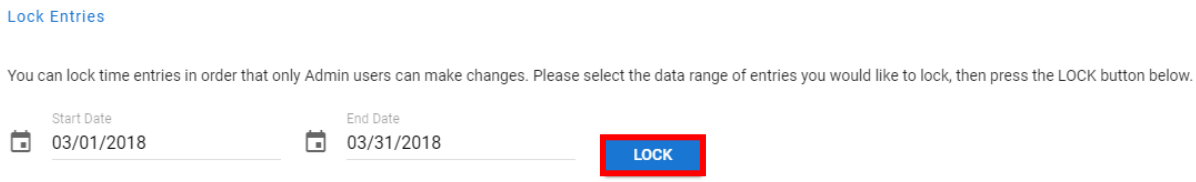
This allows you to prevent unauthorized changes from being made to billing entries during the time they are being reviewed for final billing, or after the entries have been billed.

Only Administrator users can lock or unlock entries.

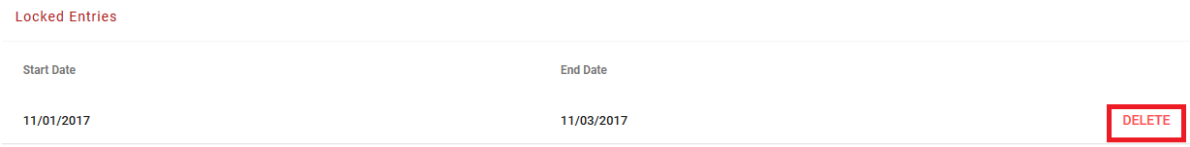
To lock entries, an Administrator can go to the “SETTINGS” button on the top right.

Click “LOCK ENTRIES” in the blue navigation bar

Enter a start 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 of this section, there will be a “Locked Entries” section that will show what time periods have been locked in. Administrator users can unlock the selected time period by pressing the red “DELETE” button on the bottom right.

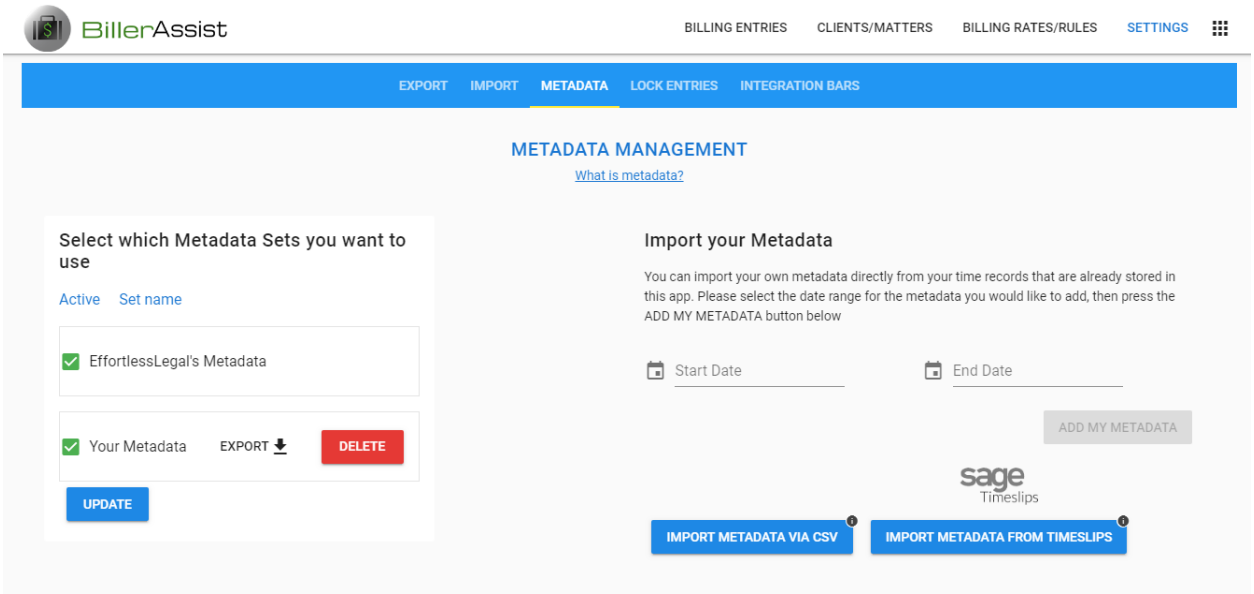


What the Color Codes Mean

BillerAssist uses color codes to alert your users in real-time regarding potential problems in their billing.

BillerAssist also learns from your changes, and gets better and more accurate the more you use it.

The color codes are based on billing data. You can use your own billing data for the color codes. You can also use EffortlessLegal's billing data, or use both your billing data and EffortlessLegal's billing data. An Administrator user can change these settings in the "Metadata" section of the "Settings" tab.



If you use your own billing data for the color codes, BillerAssist will learn from your changes every time you export billing data.

The billing data used for the color coding will be automatically updated whenever an Administrator user exports billing data from our app. BillerAssist's machine learning technology automatically re-trains itself using the billing data that an Administrator exports from our app.

"Amount" column:

You will notice that certain entries will change color in the "Amount" column.

The color codes in this column indicate whether the time or expense entry is unusually high or low, or whether the amount is normal.

Date	Type	Amount	Timekeeper	Client	Matter	Description
03/05/2019	Time	0.40 hrs (24 mins)	Pavlo Haidar	Client A	Matter A	Correspondence to client re: status of case.
08/29/2019	Time	0.30 hrs (18 mins)	Timekeeper B	Client C	Matter A	Call with potential mediator re: scheduling mediation.
08/29/2019	Time	1.00 hrs (60 mins)	Timekeeper C	Client B	Matter B	Draft motion for summary judgment.
09/09/2019	Time	9.20 hrs (552 mins)	Kam Bhagia	Acme	Crestline Property	Correspondence to client re: scheduling conference call.
09/12/2019	Time	9.20 hrs (552 mins)	Yurii Selskyi	Acme	Crestline Property	Correspond with client re: settlement.

The three color codes in the "Amount" column mean as follows:

– Red: The value in the Amount field is abnormally high (or abnormally low)

– Yellow: The value in the Amount field is somewhat high (or somewhat low)

□ – White: The value in the Amount field is normal

The color codes appear as entries are being made.

Therefore, the color codes in the "Amount" column allow users to know immediately if the time or expense entry might not be billable or payable because the amount is unusually high. This allows your users to avoid doing work that will not be billed or will not be paid.

These color codes also alert users when they might have made a mistake in entering the "Amount" of a time or expense entry, because the amount is unusually low.

If you use your own billing data for the color codes, BillerAssist will learn from your changes and adjust the color coding every time an Administrator exports billing data.

"Client" and "Matter" columns:

You will also notice that certain entries will change color in the "Client" and "Matter" columns.

The color codes in these columns indicate whether the total amount of time logged for the Matter is unusually high or low, or whether the total amount is normal.

Date	Type	Amount	Timekeeper	Client	Matter	Description
03/05/2019	Time	0.40 hrs (24 mins)	Pavlo Haidar	Client A	Matter A	Correspondence to client re: status of case.
08/29/2019	Time	0.30 hrs (18 mins)	Timekeeper B	Client C	Matter A	Call with potential mediator re: scheduling mediation.
08/29/2019	Time	1.00 hrs (60 mins)	Timekeeper C	Client B	Matter B	Draft motion for summary judgment.
09/09/2019	Time	9.20 hrs (552 mins)	Kam Bhagia	Acme	Crestline Property	Correspondence to client re: scheduling conference call.
09/12/2019	Time	9.20 hrs (552 mins)	Yurii Selskyi	Acme	Crestline Property	Correspond with client re: settlement.

The three color codes in the "Client" and "Matter" columns mean as follows:

– Red: The total amount of charges for the Matter is abnormally high (or abnormally low)

– Yellow: The total amount of charges for the Matter is likely a bit high (or likely a bit low)

□ – White: The total amount of charges for the Matter is normal

The color codes appear as entries are being made.

Therefore, the color codes in the "Client" and "Matter" columns allow users to know immediately if the time or expense entry might not be billable or payable, because the amount of time or expenses logged for the entire Matter is unusually high. This allows your users to avoid doing work that will not be billed or will not be paid.

If you use your own billing data for the color codes, BillerAssist will learn from your changes and adjust the color coding every time an Administrator exports billing data.

"Description" column:

You will also notice that certain entries will show color codes in the "Description" column.

The color codes in this column indicate whether the time or expense entry violates a Billing Rule set for the Client or Matter, and whether the text description is a standard one that has already been approved for usage.

Date	Type	Amount	Timekeeper	Client	Matter	Description
03/05/2019	Time	0.40 hrs (24 mins)	Pavlo Haidar	Client A	Matter A	Correspondence to client re: status of case.
08/29/2019	Time	0.30 hrs (18 mins)	Timekeeper B	Client C	Matter A	Call with potential mediator re: scheduling mediation.
08/29/2019	Time	1.00 hrs (60 mins)	Timekeeper C	Client B	Matter B	Draft motion for summary judgment.
09/09/2019	Time	9.20 hrs (552 mins)	Kam Bhagia	Acme	Crestline Property	Correspondence to client re: scheduling conference call.
09/12/2019	Time	9.20 hrs (552 mins)	Yurii Selskyi	Acme	Crestline Property	Correspond with client re: settlement.

The three color codes in the "Description" column mean as follows:

– Yellow: The entry likely violates Billing Rule set for the Client or Matter

– Green: The exact text of the entry already appears in the chosen set of billing data, which means it has been previously approved for submission in an invoice to clients

□ – White: The exact text of the entry does not already appear in the chosen set of billing data, but the entry does not appear to violate any Billing Rule set for the Client or Matter

The color codes appear as entries are being made.

Therefore, the color codes in the "Description" column allow users to know immediately if the time or expense entry might violate a Billing Rule for the Client or Matter. This allows your users to avoid doing work that will not be billed or will not be paid.

An Administrator user can set and adjust the Billing Rules for specific Clients and Matters in the Billing Rates/Rules tab.

These color codes also alert users that the text they used to describe the entry is non-standard, and might need to be revised or edited.

How to Set Up Metadata

We suggest that you use your own billing data to make the automation and machine learning features in this application follow your own billing styles and preferences.

You can import and use your own billing data. We refer to your imported billing data as "Metadata".

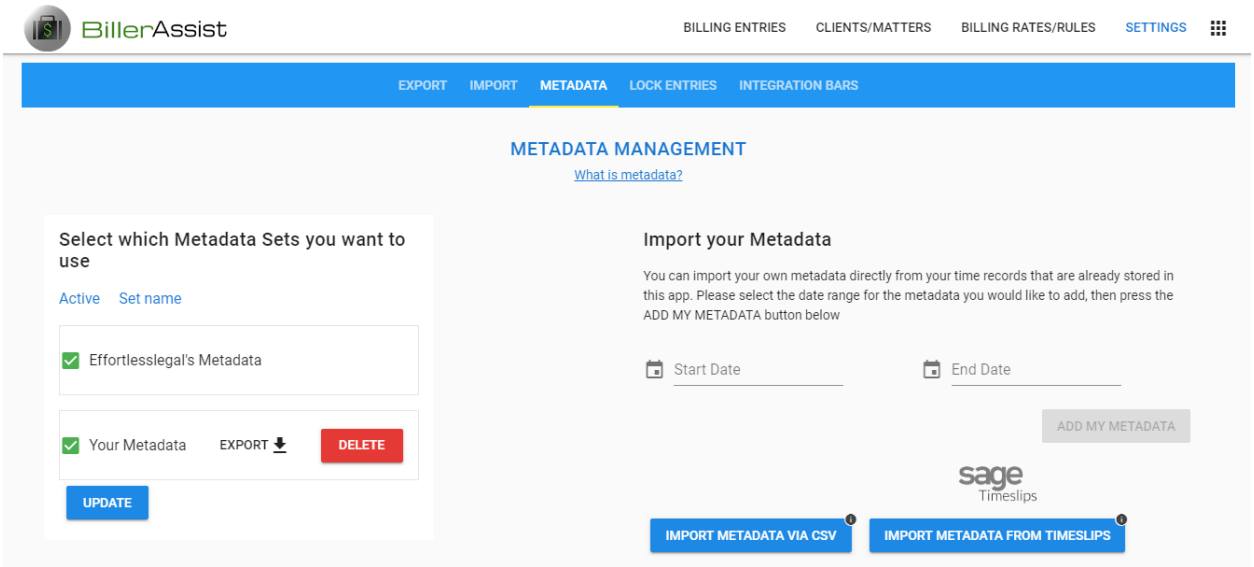
Your Metadata belongs to you, and is not shared with anyone.

BillerAssist comes with a set of Metadata generated by EffortlessLegal. This provides a good basis for you to start using the app right away. However, as noted above, we suggest that you should use your own Metadata, in order to get the best results.

Only Administrator users can manage the Metadata for your account.

To import and use your own Metadata:

- As an Administrator user, go to the “Settings” tab, and click the “Metadata” button



- You can then import your Metadata from your billing and practice management system, or from BillerAssist itself, using the functionality on the right side of this section.

- The functionality on the left side of this section allows you to select the Metadata sets you want to use.

If you select “Your Metadata”, BillerAssist will learn from your changes and adjust the color coding and other automated functions every time an Administrator exports billing data.

This allows BillerAssist's machine learning to be trained to fit your firm's specific needs.

More Metadata is better.

For the best results, we suggest you use your own Metadata only. In order to do this, you should select to use "Your Metadata" only.

However, if you do not have at least 2 years of billing data to use for your Metadata, we suggest you should use both EffortlessLegal's Metadata, and your own Metadata. In order to do this, you should select to both "Your Metadata" and "EffortlessLegal's Metadata".

Press the "UPDATE" button to implement your selection.

Assigning Billing Rates

When you import billing entries from your billing system, BillerAssist will automatically program the hourly billing rates for your users.

Billing rates can also be manually assigned by user, and by Client, and by Matter. There is no limit on the number of users, Clients, or Matters that can be assigned billing rates.

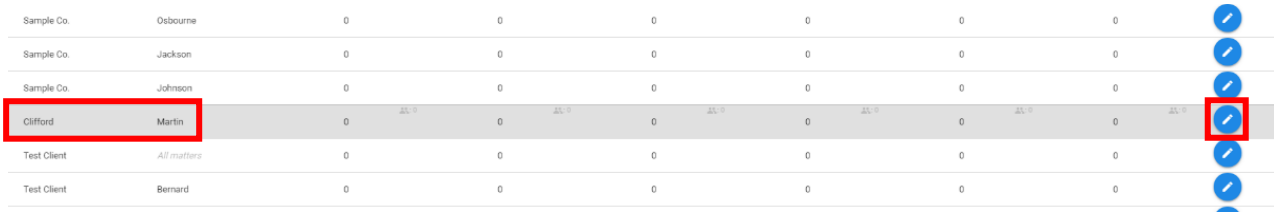
This way, when you export billing entries to your billing system, BillerAssist will show who is billing at which hourly rate, and which hourly rate applies to which specific Client or Matter.

To manually assign billing rates:

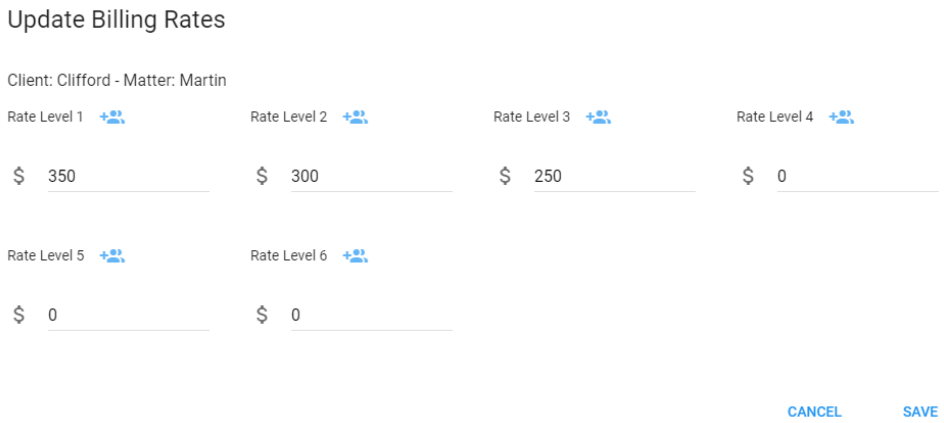
- Billing rates can only be set and adjusted by Administrator users

- Using an Administrator account, go to the "Billing Rates/Rules" tab.

- Next, chose the client or matter you want to assign billing rates to. Click the pencil button on the far-right side.



- A window will appear to update the billing rates for the matter you select. Now you can input tiered billing rates as needed.



BillerAssist allows you to assign specific hourly billing rates for specific Clients and specific Matters. In order to do this, users are grouped together into Rate Levels.

A billing Rate Level is a group of users. The hourly billing rates of all users in a single Rate Level rise and fall together relative to other users. In other words, all users whose hourly billing rates differ from other users should be grouped together and assigned to a single Rate Level.

For example:

- If your firm charges different hourly rates for first-year associates than what it charges for second-year associates, all first-year associates should be assigned to one Rate Level, and all second-year associates should be assigned to a different Rate Level

- If your firm charges different hourly rates for associates than what it charges for partners, all associates should be assigned to one Rate Level, and all partners should be assigned to a different Rate Level

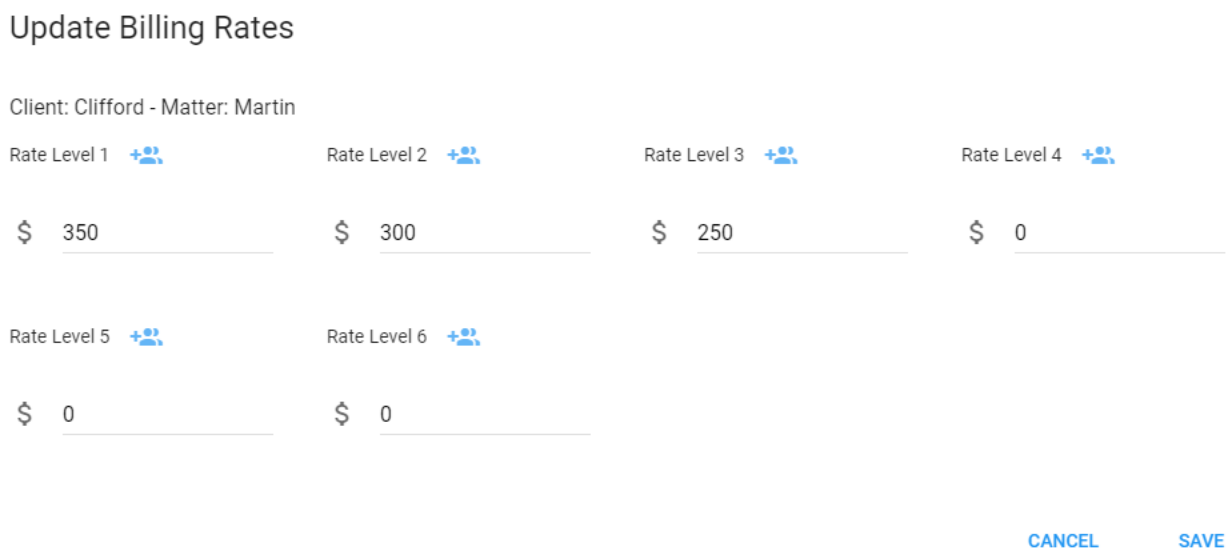
The billing rates for specific Matters and specific Clients can then be set individually.

For example:

- If your firm charges an hourly rate of XYZ for first-year associates when they work on matters for a specific Client ("Client 123"), and hourly rate of ABC for first-year associates when they work on matters for a different Client ("Client 456"), all first-year associates should be assigned to one Rate Level ("Rate Level - 1st Yrs"). Then, the billing rates for "Rate Level – 1st Yrs" can be set at XYZ for Client 123, and ABC for Client 456. This way, whenever your first-year associates work on matters for Client 123 their hourly rates will be set at XYZ, and whenever your first-year associates work on matters for Client 456 their hourly rates will be set at ABC.

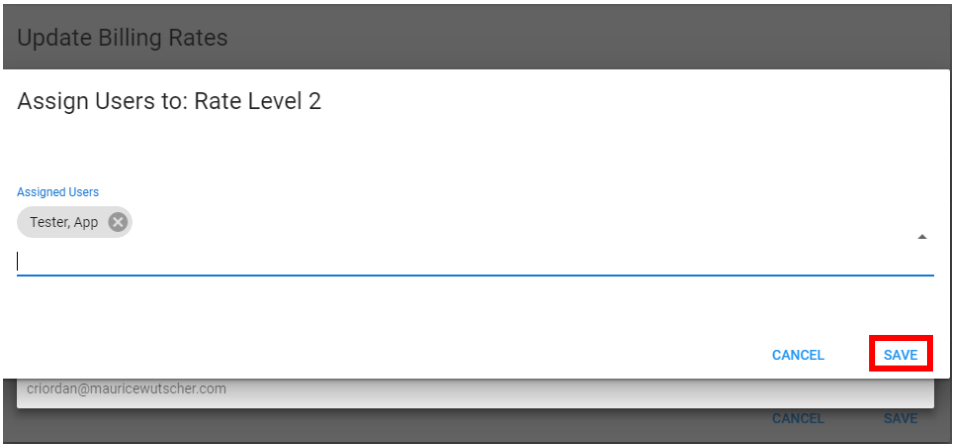
- If your firm charges an hourly rate of 123 for associates when they work on matters for a specific Client ("Client XYZ"), and hourly rate of 456 for partners when they work on matters for the same Client, then all partners should be assigned to one Rate Level ("Rate Level - Partners"), and all associates should be assigned to another Rate Level ("Rate Level – Associates"). Then, the billing rate for "Rate Level – Associates" can be set at 123 for Client XYZ, and the billing rate for "Rate Level – Partners" can be set at 456 for Client XYZ. This way, whenever associates work on matters for Client XYZ their hourly rates will be set at 123, and whenever partners work on matters for Client XYZ their hourly rates will be set at 456.

You can set up as many as 20 different groups or Rate Levels. This means you could have 4 different billing Rate Levels for your paralegals (each with different hourly rates for specific Clients or specific Matters), 10 different billing Rate Levels for your associates (each with different hourly rates for specific Clients or specific Matters), and 6 different billing Rate Levels for partners (each with different hourly rates for specific Clients or specific Matters). Or, you could just use 2 different billing Rate Levels for your paralegals, 3 different billing Rate Levels for your associates, and 2 different billing Rate Levels for partners.



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."

Now, whenever “App Tester” bills for this matter, BillerAssist knows that the user (here, “App Tester”) will be billed at a specific hourly rate (here, $300/hour) when the user works on a specific client or matter (here, “Client: Clifford, Matter: Martin”).

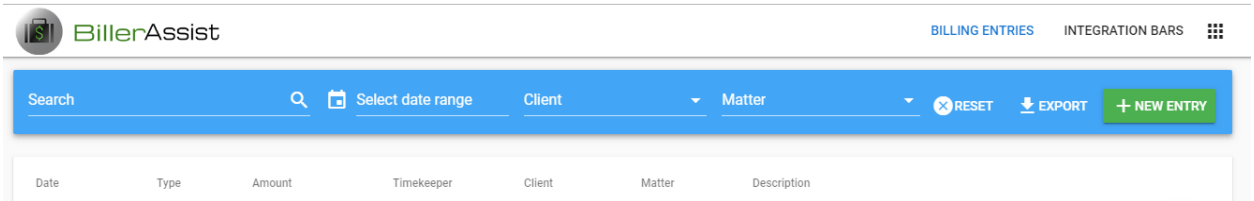
BillerAssist applies the various billing rates to all entries. Our app will not display the billing rates in the “Billing Entries” view. However, the billing rates will appear when entries are exported to your billing system.

In the above example, this means that all time entries by the user named “App Tester” for “Client: Clifford, Matter: Martin” will have the hourly billing rate of $300/hr.

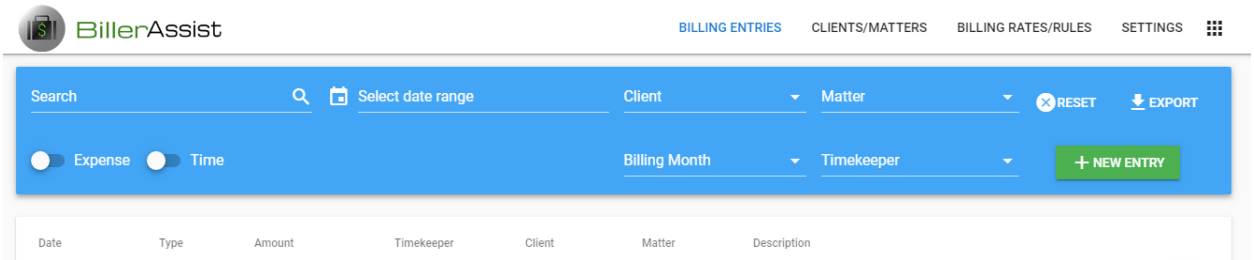
Exporting Billing Entries

1. Any user can export billing entries.

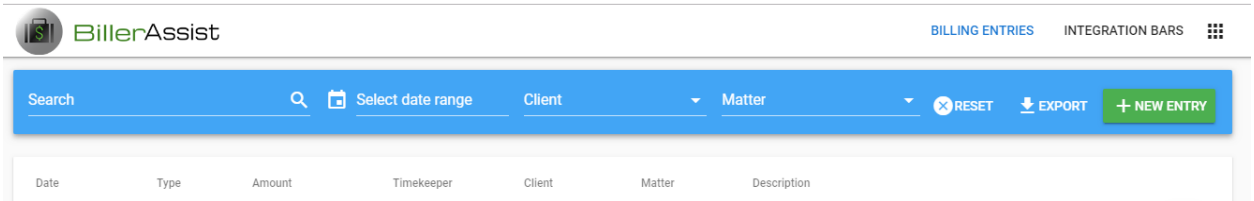
Timekeeper and Local Counsel users can select the date range of billing entries that they would like to export. They can also export only billing entries that contain words, by using the "Search" feature. Or, they can export only billing entries for certain Clients or Matters.



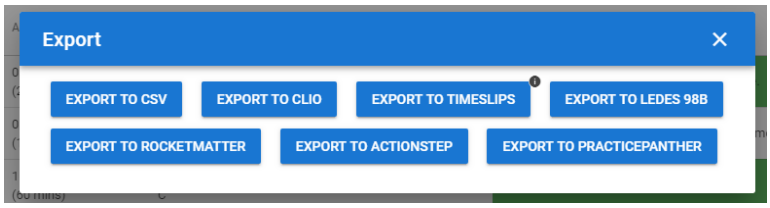
Administrator users can also select to export only "Expense" or "Time" entries, or entries for an entire month, or entries by specific users.



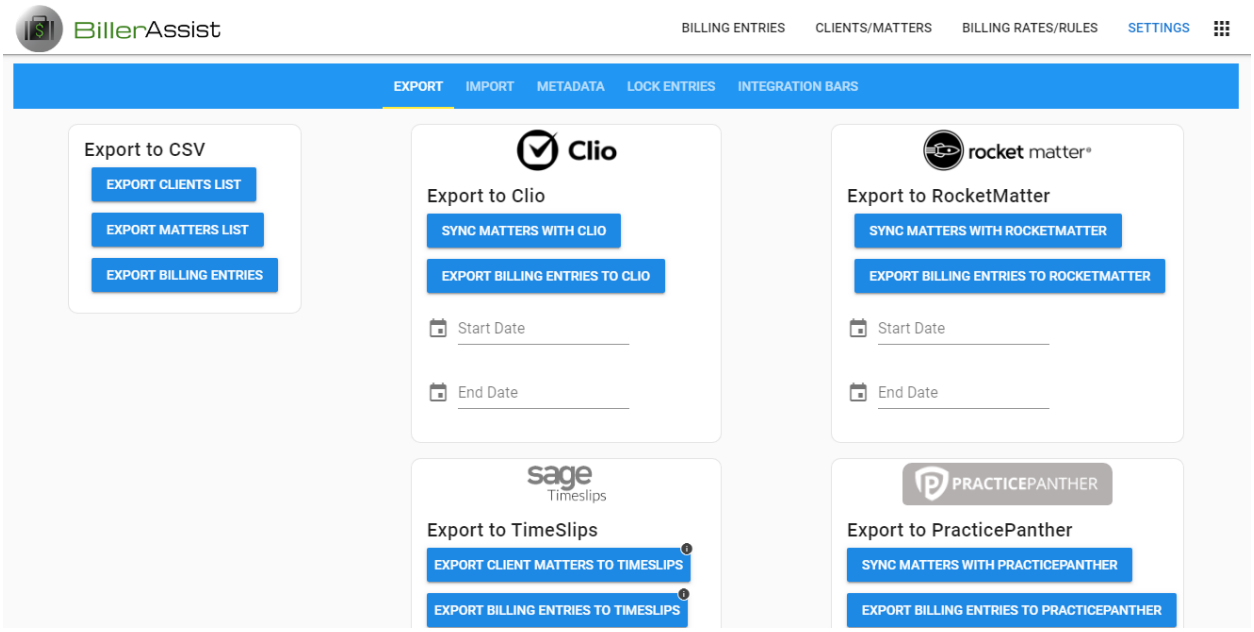
2. Once the appropriate range of billing entries has been selected, simply click the "EXPORT" button on the right side of the blue bar.



3. A popup window will appear, providing the user with the various selections for exporting the selected billing entries.



4. Administrator users can also export billing entries by clicking “SETTINGS”, and then the “EXPORT” button. You will see options to export the data to a CSV file, or directly to your billing and practice management system.



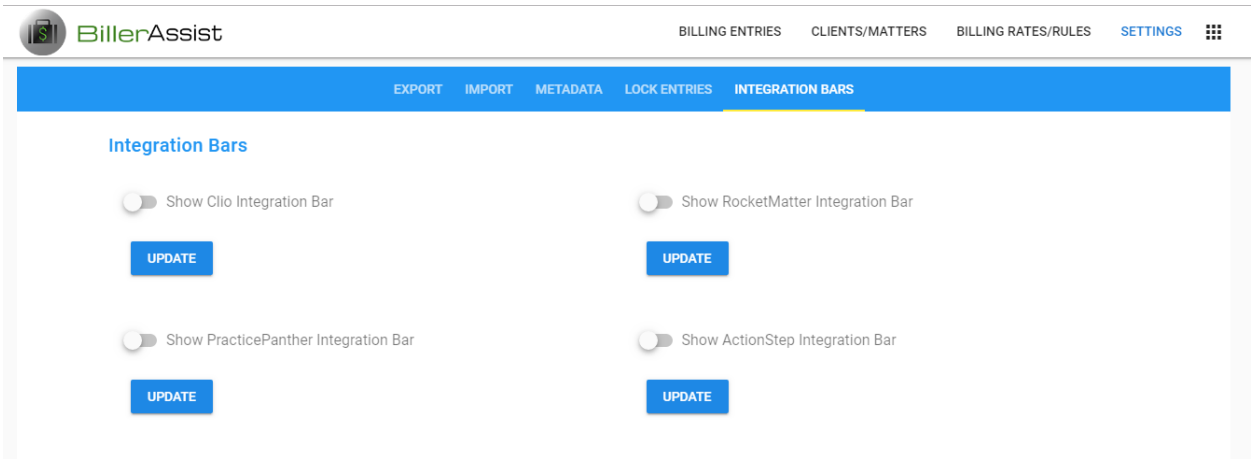
Integration Bars

BillerAssist provides an easy way to toggle back and forth with your billing and practice management system.

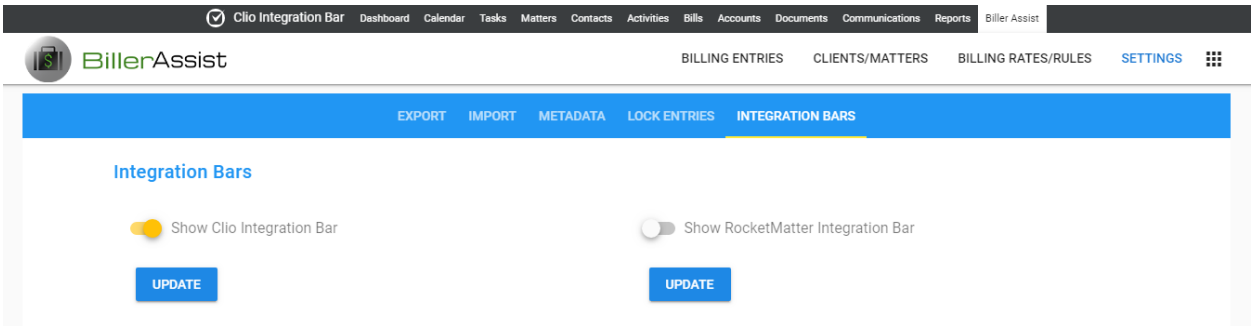
Our app provides a function to show an “Integration Bar” at the top of the BillerAssist screen. The Integration Bar contains buttons for all of the tabs in your billing and practice management system.

This allows your users to keep BillerAssist open in one tab in their internet browser, and your billing and practice management system open in another browser, using both apps easily at the same time.

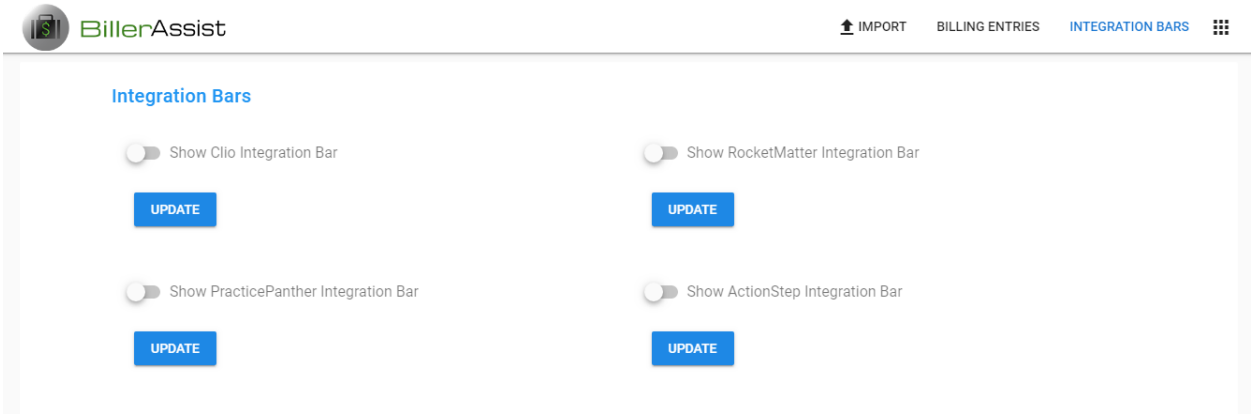
Administrator users can turn on an Integration Bar by navigating to the “Settings” tab, and pressing the “Integration Bars” button.



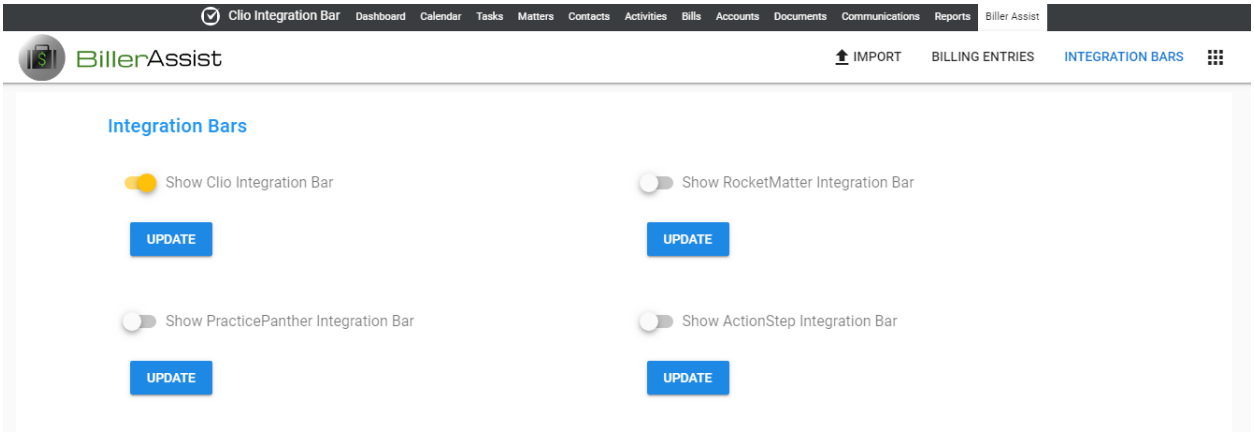
After turning on the selected Integration Bar and pressing the “UPDATE” button, the selected Integration Bar will appear at the top of the page.



Timekeeper and Local Counsel users can turn on Integration Bar by navigating to the “Integration Bars” tab at the top right of the page, and making their selection.



Just like with Administrator users, when Timekeeper and Local Counsel users turn on the selected Integration Bar and press the “UPDATE” button, the selected Integration Bar will appear at the top of the page.



Conclusion

BillerAssist substantially reduces the amount of time involved in your billing process, saving you time and money! Tedious billing is now the old way of doing things. The faster, cheaper, and better way is BillerAssist.

- Tells your users in real-time when a charge is unusually high
- Tells your users in real-time when an entry violates a client billing rule
- Learns from your changes
- Helps standardize your billing entries for cleaner bills
- Gets your bills done in a snap