CounselLink®

Submitting a Staffing List in CounselLink

The **Staffing List** feature allows firms to specify which timekeepers will bill on a specific matter. To submit a staffing list for approval:

1. Click the **Matters** tab.
2. Click the **Corporate Customer Matter ID** or **Matter Title** for which you would like to submit a staffing list.
3. Click the **Law Firms** subtab in the Matter.
4. Place a check to the left of the Law Firm's name.
5. Click **Edit Staffing List**.
6. Place a **check** to the left of all the timekeepers' names that will have billable time for the matter.
7. Click **Activate.**
8. Verify timekeeper status is ***Pending Staffing List Approval***.
9. Repeat this for any other timekeepers that will bill for time on this matter.
    - Timekeepers with the **Active** status have already been approved to bill on the matter.
    - Timekeepers with the **Inactive** status are not approved to bill on the matter.
    - Timekeepers with the **Pending Request for Approval** status means that the approval process was started but not completed by the law firm. Law firms must click **Request Approval** to finish the staffing approval request. This will send the request to the client. The status then changes to **Pending Staffing List Approval**.
10. Place a **check** to the left all timekeepers that have the ***Pending Staffing List Approval*** status.
11. Click **Submit For Approval** to submit the list to the client for approval

Note: The client receives an email that the staffing list needs approval.

12. Click the **Home** tab.

Note: The matter will show under **Pending Resolution**. If it does not, you failed to click **Submit For Approval**.