

STEP 1: Adding New Timekeepers

The term **Timekeeper** refers to anyone who does billable work for CATIC. Official titles for people who are considered CounselLink timekeepers may include but are not limited to attorneys, paralegals, legal assistants, consultants, etc. Timekeepers must be added to CounselLink before charges can be added for them on any invoice.

Add an Individual Timekeeper

1. In the Profiles section of the Home page under the Offices label, click your law firm office link.

The screenshot displays the CounselLink Home page dashboard. At the top, there are four summary cards: 'Matters PENDING RESOLUTION' (0), 'Invoices REJECTED & APPROVED BY CLIENT (UP TO 30 DAY...)' (0), 'Fee Offers PENDING CLIENT APPROVAL' (1), and 'Invoices INACTIVE / INCOMPLETE' (0). Below these are several sections: 'Matters' with a 'My Matters' card (0) and a list of 'Pending Resolution', 'Awaiting Acceptance', and 'Budget Action Required'; 'Fees & Discounts' with 'Review Required' (Pending Client Approval: 1, Partially Approved Offers: 0, Rejected Offers: 0) and 'Volume Discounts' (0); 'Billing' with 'Invoices' (Action Required for Collaborative Review, Inactive / Incomplete, On Hold, Scheduled, Rejected by Billing Guidelines Review, Rejected by Client, Adjusted & Approved by Client) and 'Accounts' (Submitted, Requested); 'Messages' with a message about 'Law Firm OnDemand Training for CounselLink'; and 'Profiles' with 'Law Firm' (Brent Test) and 'Individual' (Brent, Keith) sections. A red arrow points to the 'Offices' section under 'Individual' profiles, which lists 'Brent Test, Sacramento'.

2. Scroll down to the Office Staff section of the profile and click Add User.

The screenshot shows the 'Office Staff' section of a profile. It features four buttons: 'Edit Roles', 'Add User', 'Import Timekeepers', and 'Export Timekeepers'. A red arrow points to the 'Add User' button.

3. On the Add New Individual page, complete all the required fields, as denoted by the asterisk (*).

Please note the following:

- If the biller is an attorney, change **Practicing Attorney** to YES. Otherwise leave the default setting.
- Change **Activate Login** to YES only if this person needs to log into CounselLink. Most timekeepers do not need access. If the default remains NO, an **email address** is not required.
- The **Primary Timekeeper ID** must match the identifier used on your invoices for this biller. The ID can be numbers, letters or a combination of both.



The screenshot shows a form titled "Timekeeper Information". Two red arrows point to the "Timekeeper Level" and "Primary Timekeeper ID" fields. The "Timekeeper Level" field is a dropdown menu with "Associate" selected. The "Primary Timekeeper ID" field is a text box containing "NN". Both fields have an asterisk (*) next to their labels, indicating they are required.

4. Click **Save**
5. If the timekeeper is a practicing attorney, a Roles screen displays. Do not change the default settings - click **Save**
6. Repeat these steps to add all timekeepers who will bill CATIC.

STEP 2: Making a New Fee Offer to CATIC

1. Click FEES on the Menu Bar. You will now see a list of all of your active Fee Offers. Click the "8905" "Detailed Hourly Rate Fee Structure in Use by CATIC".

The screenshot shows the CounselLink interface. The top navigation bar includes 'CounselLink', a search bar, and user information. The main menu has 'Fees' highlighted in yellow with a red arrow pointing to it. Below the menu, there are filters for 'Fee Structure Status' (Active) and 'Fee Offer Status' (Active). A table lists 6 fee structures. The first row, with ID '8905' and name 'Detailed Hourly Fee Structure in use by CATIC', is highlighted in yellow and has a red checkmark next to it. Other rows include '8906', '8995', '9008', '9009', and '9335'.

Fee Structure ID	Fee Structure Name	Fee Structure Status	Group Type	Law Office Name	Area of Law	Sub-Category
8905	Detailed Hourly Fee Structure in use by CATIC	Active	Private	CATIC Vendor, Rocky Hill	General	General
8906	Flat Fee (Multiple Billing) Structure in use by CATIC	Active	Private	CATIC Vendor, Rocky Hill	General	General
8995	Flat Fee (Single Billing) Structure in use by CATIC	Active	Private	CATIC Vendor, Rocky Hill	General	General
9008	Contingency #1 Fee Structure	Active	Private	CATIC Vendor, Rocky Hill	General	General
9009	Contingency #2 Fee Structure	Active	Private	CATIC Vendor, Rocky Hill	General	General
9335	NLV Fee Structure for CATIC	Active	Private	CATIC Vendor, Rocky Hill	General	General

2. On the next page, go to the bottom click the "Fee Offer ID".

The screenshot shows the detail page for Fee Structure 8905. It includes sections for 'Fee Structure Information' and 'Current and Future Offers (1)'. The 'Current and Future Offers' section has a table with one row. The 'Fee Offer ID' field in this row is highlighted with a red arrow.

Fee Offer ID	Effective Date	Status
8030015537	05/01/2021 12:00 AM PDT	Active

3. On the next page, click the plus "+" sign.

Fee Offer: 5030045537 Active
Submitted By: CATIC Vendor, Rocky Hill

Fee Offer
Effective Date: 05/01/2021 12:00 AM PDT
Submitted By: John Scanlon
Submitted On: 02/08/2022 12:25 PM PST

Most Recent Action
Fee Offer Backdated
Action Taken By: TEST User
Action Taken On: 02/08/2022 12:26 PM PST

Fee Offer Currency
US Dollar

Fee Structure
Fee Structure Name: 8905 - Detailed Hourly Fee Structure in use by CATIC
Fee Structure Currency: US Dollar
Group Type: Private
Area of Law: General

Offer Details | Documents | History

Stage Structure

Line #	Stage	Fee Type	Offered Amount
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4. A Copy Fee Offer page will open. This is where you can create your New Fee Offer. First, add \$0.00 for the Stage Structure section. Second, add in the hourly rates for the Timekeepers you have add or are changing. Hit the SAVE button. You are now done!

Copy Fee Offer
In Use By CATIC Financial, Inc

Fee Offer
Effective Date: 08/08/2023
Fee Offer Currency: US Dollar
Reason for Fee Offer

Fee Structure
Fee Structure Name: 8905 - Detailed Hourly Fee Structure in use by CATIC
Fee Structure Currency: US Dollar
Group Type: Private
Area of Law: General

Stage Structure

Line #	Stage	Fee Type	Offered Amount
1	Detailed Hourly Fees (plus expenses)	Detail Billing	0.00

Rate Structure

Rate Structure	Max Allowed	Offered Amount
No Level Rates		0.00

Timekeepers

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Group By: Timekeeper Level

Timekeeper	Initials	Rate	Reason for Rate Change
Timekeeper Level: Other			
Scanlon, John	JRS	200.00	

1 items | Show 25