

STEP 1: Adding Timekeepers

The term **Timekeeper** refers to anyone who does billable work for a client. 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 ADJUSTED & APPROVED BY CLIENT (UP TO 30 DAYS)' (0), 'Fee Offers PENDING CLIENT APPROVAL' (1), and 'Invoices INACTIVE / INCOMPLETE' (0). Below these are several main sections: 'Matters' with 'My Matters' (0) and 'Pending Resolution' (Awaiting Acceptance, Budget Action Required); 'Fees & Discounts' with 'Review Required' (Pending Client Approval: 1, Partially Approved Offers, Rejected Offers) 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 'Accruals' (Submitted, Requested); 'Messages' with a message about 'Law Firm OnDemand Training for Counsellink'; and 'Profiles' with 'Law Firm' (Bruni Test) and 'Individual' (Bruni, Keith). Under the 'Offices' section in Profiles, the link 'Bruni Test, Sacramento' is highlighted with a red arrow.

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



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.



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 the client

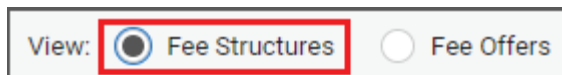
STEP 2: Making an Offer to CATIC

log into Counsellink to enter the timekeeper rates:

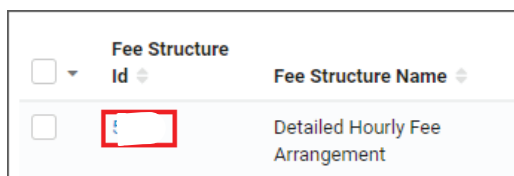
1. Confirm that your client's name displays in the upper left corner of your Counsellink Home page. If not, select the client from the drop-down list.



2. Click the **Fees** tab. In the top right corner, confirm the **Fee Structures** view is selected.



3. Click the **Fee Structure ID** link. The Fee Structure Overview page displays.



4. Click:
8905 General Detailed Hourly Fee Structure in use by CATIC

5. Select the **Fee Offers** tab

Fee Structure: 5238 ACTIVE
 In Use By: T&D Inc.

Fee Structure Information

Fee Structure ID 5238	Fee Structure Currency US Dollar
Fee Structure Name Detailed Hourly Fee Arrangement	Group Type Private
Fee Offers Controlled By Law Firm	Area of Law General
	Matter Type General

Stage Structure Fee Offers ←

Current and Future Offers (0)

[+ Add Fee Offer](#) Filter Offers by Type

Group By: None

Fee Offer ID	Effective Date	Status

6. Click the **Add Fee Offer** button. The **Create Fee Offer** screen displays.
7. **Effective Date:** Leave the default date set to the current date.
8. **Fee Offer Currency:** Select if different from the default value.
9. **Offered Counties:** Leave the default state and counties of **N/A - N/A**.

10.

Timekeepers: Enter the timekeeper’s hourly rate in the Rate box for each individual timekeeper that will be billing for this client’s matters. Note: If a listed timekeeper will not bill this client, leave their box blank. **Do not enter \$0.**

Create Fee Offer
 In Use By T&D Inc.

Fee Offer

Effective Date 11/19/2019

Fee Offer Currency US Dollar ←

Reason for Fee Offer

Fee Structure

Fee Structure Name
5238 - Detailed Hourly Fee Arrangement

Fee Structure Currency
US Dollar

Group Type
Private

Area of Law
General

Stage Structure

Line #	Stage	Fee Type	Offered Amount
1	Detailed Hourly Rates	Detail Billing	Enter values below
Rate Structure			Offered Amount
Partner Rate			<input type="text"/>
Associate Rate			<input type="text"/>
Paralegal Rate			<input type="text"/>

Please leave Stage Structure blank or add \$0.00 if you cannot move on to the next section

Timekeepers

[Download Timekeeper Rates Template](#) [Upload Timekeeper Rates](#)

Group By: Timekeeper Level

Timekeeper	Initials	Rate	Reason for Rate Change
Timekeeper Level: Associate			
User, Admin	ADM	<input type="text"/>	<input type="text"/>
Timekeeper Level: Partner			
Partner, Larisa	PLP	<input type="text"/>	<input type="text"/>

2 items Show 200

11.

Click **Save**, then **OK**. The fee offer will show a 'Pending Approval' status. Counsellink notifies your client that your rates are ready for their review.

Note: If your client requires that their Billing Guidelines be acknowledged online, a notification displays at the top of the screen. See instructions below for how to **Acknowledge Billing Guidelines**.

STEP 3: Approving CATIC's Billing Guidelines

Your client may require that you acknowledge their billing guidelines online. To access the guidelines:

1. Select to the **Info Center** tab
2. Click the **Billing Guidelines** link

Test Client # 2 (541811) Matters Invoices Fees Profiles **Info Center**

Info Center

Billing Guidelines

Document Name	Acceptance	Last Published	Due Date	Status	Accepted On	Accepted By
Default Billing Guidelines	Required	08/20/2016	01/05/2019	Pending		Accept

3. The billing guidelines can be printed by clicking the Print link in the upper right corner of the page
4. The Billing Guidelines Agreement Confirmation displays
 - a. Select the check box to acknowledge the statement
 - b. Click **Accept**

Acknowledgement

I hereby acknowledge my understanding of, and agreement to, these outside counsel & vendor Billing Guidelines, and certify that I have the authority to enter into this agreement on behalf of the law firm or legal vendor set forth below.

[Accept](#) [Decline](#)

Please now go to the PDF entitled "3. Upload OR Email Your Invoice to CounselLink" for instructions for submitting invoices