rb8

RB8 legal support firm software

Electronic Billing User Guide

Electronic Billing

Electronic billing, otherwise known as e-billing, is the method of submitting an invoice to a customer in a format readable by its computer or database systems. Traditionally, invoices have been submitted to customers in paper format. By processing electronic bills, corporations recoup savings in paper handling and processing costs.

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Export Invoices

What is LEDES?

RB8 users can now export invoices in *LEDES* format. The Legal Electronic Data Exchange Standard (LEDES) was developed in 1995 by the accountants at Price Waterhouse and a consortium of time and billing software developers. LEDES is designed to improve accuracy and efficiency by ensuring electronic invoices are complete and can be imported directly into billing systems, without manual entry.

Over the years, many file formats were developed. However, LEDES 1998B is the only format RB8 supports at this time. LEDES 1998B was adopted in 1998, and it is by far the more commonly used LEDES format. It lacks some flexibility, having a rigid structure. Another disadvantage of LEDES 1998B is that invoice-level data is repeated on every line item even though it is only needed once, as it does not vary per line. Nonetheless, law firms prefer it for its simplicity and familiarity.

Export Invoices

What is UTBMS?

LEDES employs a coding system known as *UTBMS.* The Uniform Task Based Management System (UTBMS) was co-developed in 1995 by the American Bar Association (ABA), American Corporate Counsel Association (ACCA) and Price Waterhouse in an effort to standardize billing procedures and practices by law firms. This method of work product classification provides unique billing codes and matching category descriptions that are intended for use in detailed client billings.

UTBMS coding is broken into three components:

- **Task Code** describes the task performed. For example, L330 is used for depositions.

- **Activity Code** describes the actual work performed by the timekeeper. For example, A109 is used for appearing/attending.

- **Expense Code** describes the expense submitted. For example, E107 is used for delivery services.

Service Items Master

Entering UTBMS codes for service items

For invoices to be LEDES compliant, every service item on each invoice must be coded properly with UTBMS codes. The best way is to start with the Service Items Master List, then "mass update" the billing rate tables. If your client has not provided the codes, you can obtain them at www.utbms.com. (See the appendix for the standard litigation code set adopted by ABA.)

1. On the menu bar in RB8, click **Setup > Service Items Master.**

2. Click **Search** to list all the service items.

3. Double-click a service item.

4. In the LEDES 1998B section, enter the following information:

    *   **Exp/Fee Type** – Select Expense if this is an expense item such as delivery. Select Fee if this is a timekeeper fee such as attendance fee.
    *   **Task Code** – Enter the task code (e.g., L330) if this is a fee item. Leave blank for an expense item.
    *   **Expense Code** – Enter the expense code (e.g., E115) if this is an expense item. Leave blank for a fee item.
    *   **Activity Code** – Enter the activity code (e.g., A109) if this is a fee item. Leave blank for an expense item.

LEDES 1998B			
Exp/Fee Type:	Expense	Task Code:	
Expense Code:	E115	Activity Code:	

5. Click **Save.**

6. Click **Actions** > **Mass Update** > **Billing Rates.**

7. Check four boxes– **Exp/Fee Type, Task Code, Expense Code** and **Activity Code.**

8. In the Billing Rates section, check the **Update** box to select a billing rate table. To select all of the billing rate tables at once, click **Check All.**

9. Click **Save and Close.**

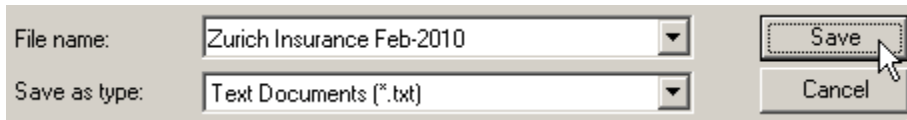10. Repeat steps 3 through 9 until you have updated all of the service items.

NOTE

Even though it might be rare, it is possible for an insurance company to require different codes than the standard. In that case, simply update the billing rate tables belonging to the insurance company without modifying the service items master list.

Export Invoices

Exporting invoices in LEDES format

Once you have invoices generated with proper UTBMS codes, you can export them in LEDES format, then email the text file to the client.

1. On the menu bar in RB8, click **Billing > Export Invoices.**

2. In the Search Criteria pane, select the firm (Bill To) and other parameters.

3. Click **Search** (or press **Alt + S).** RB8 lists all of the invoices that meet the specified search condition(s).

4. Right-click on the grid, then choose **Check All.**

5. Right-click on the grid, then choose **Export LEDES 1998B.**

6. In the Save As window, type a file name in the **File Name** field, then click **Save.**

| File name: | Zurich Insurance Feb-2010 | ▼ | Save |
| Save as type: | Text Documents (*.txt) | ▼ | Cancel |

! **IMPORTANT**

The **Client Matter Number** is a required field for the LEDES 1998B format. Make sure that you enter this number for each contact in the Job Parties tab.

Export Invoices

Validating exported files

Before sending the exported LEDES file to a client, it is a good idea to check that the electronic invoices contained in the file will successfully upload to the client's e-billing system, and payment will shortly follow.

You can validate the exported files easily using the free online service at www.ledesvalidation.com.

Appendix
ABA Litigation Code Set

L100 Case Assessment, Development and Administration

L110 Fact Investigation/Development
L120 Analysis/Strategy
L130 Experts/Consultants
L140 Document/File Management
L150 Budgeting
L160 Settlement/Non-Binding ADR
L190 Other Case Assessment, Development and Administration

L200 Pre-Trial Pleadings and Motions

L210 Pleadings
L220 Preliminary Injunctions/Provisional Remedies
L230 Court Mandated Conferences
L240 Dispositive Motions
L250 Other Written Motions and Submissions
L260 Class Action Certification and Notice

L300 Discovery

L310 Written Discovery
L320 Document Production
L330 Depositions
L340 Expert Discovery
L350 Discovery Motions
L390 Other Discovery

L400 Trial Preparation and Trial

L410 Fact Witnesses
L420 Expert Witnesses
L430 Written Motions and Submissions
L440 Other Trial Preparation and Support
L450 Trial and Hearing Attendance
L460 Post-Trial Motions and Submissions
L470 Enforcement

L500 Appeal

L510 Appellate Motions and Submissions
L520 Appellate Briefs
L530 Oral Argument

A100 Activities

A101 Plan and prepare for
A102 Research
A103 Draft/revise
A104 Review/analyze
A105 Communicate (in firm)
A106 Communicate (with client)
A107 Communicate (other outside counsel)
A108 Communicate (other external)
A109 Appear for/attend
A110 Manage data/files
A111 Other

E100 Expenses

E101 Copying
E102 Outside printing
E103 Word processing
E104 Facsimile
E105 Telephone
E106 Online research
E107 Delivery services/messengers
E108 Postage
E109 Local travel
E110 Out-of-town travel
E111 Meals
E112 Court fees
E113 Subpoena fees
E114 Witness fees
E115 Deposition transcripts
E116 Trial transcripts
E117 Trial exhibits
E118 Litigation support vendors
E119 Experts
E120 Private investigators
E121 Arbitrators/mediators
E122 Local counsel
E123 Other professionals
E124 Other