



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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OMTI • 3420 Bristol St., Suite 400, Costa Mesa, CA 92626

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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](http://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:	<input type="text" value="Expense"/>	Task Code:	<input type="text"/>
Expense Code:	<input type="text" value="E115"/>	Activity Code:	<input type="text"/>

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**

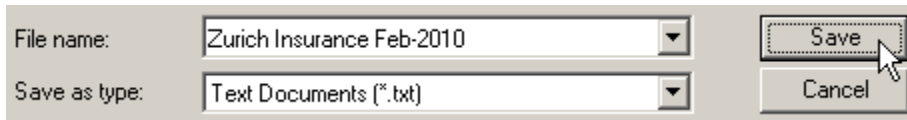
Even though it might be rare, it is possible for an insurance company to require different codes than the standard. In that case, simply update the billing rate tables belonging to the insurance company without modifying the service items master list.

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**.

**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](http://www.ledesvalidation.com).

**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