



## ELM Solutions

# *Top 10 Ways to Make Sure Your e-Billing Processes Don't Start Leaking Cash*

When your legal department uses an e-billing and matter management solution, there are several key considerations that can help you to ensure maximum benefit over the long term. The majority of these are captured during implementation, but requirements can change over time. Periodically revisit these ten guidelines to keep e-billing efficient:

1. Reduce costs associated with paper invoices by requiring all invoices to be submitted electronically, either in a standard LEDES format file or via the e-billing system's user interface.
2. Require legal service providers to use UTBMS Standard billing codes for accurate reporting.
3. Automate initial invoice testing to reject non-compliant invoices, and flag or auto-adjust line items with improper charges, so that reviewers see only the most important potential violations.
4. Support invoice escalation with an invoice review workflow based on reviewers' authority to approve invoices. Provide the ability to forward invoices to others for review.
5. Manage spend with budgeting, accruals, and timekeeper rate management.
  - Enhance budgeting quality by clearly defining what is requested from legal service providers. Enforce budget compliance through the use of invoice testing rules.
  - Support accurate accruals to meet the needs of accounting with automated reporting.
  - Ensure that your system reflects current approved timekeeper rates to avoid billing errors.
6. With top firms, use AFAs that are easy for your review teams to manage. Enforce AFA compliance with initial testing that rejects or automatically adjusts invoices. Make sure your AFAs can automatically recalculate and adjust after reviewer adjustments.
7. Build a list of panel or preferred firms and use them for all appropriate cases or matters. Use automated workflows to drive compliance.
8. Capture only those matter details that are most important for reporting and strategy, making the information required for entry. Users generally enter only required data and having too many data fields leads to inconsistent compliance and poor reporting results.
9. Use reporting to identify and quantify inappropriate billing practices and staffing abnormalities.
10. Implement reports that identify low-quality data coding by legal service providers, such as unbilled or late billed matters and charging time to non-specific task codes.