

Customer FAQ – Firm Central Sunset

August 2024

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Get Expert Help Exporting Data out of Firm Central

For Firm Central customers utilizing the **Self-Serve Data Export Portal** within Firm Central, come join Andre and Kevin, our Firm Central Product Specialists, for an “office hours” style webinar where they will share some best practices and address your questions about exporting data yourself.

[Register](#) for the August 14th Webinar

[Register](#) for the August 28th Webinar

GENERAL FAQ

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What is happening?

Firm Central, the Thomson Reuters practice management platform and some secondary products (Affinipay, eBillity, Time & Billing and any Firm Central Storage materials) will be sunset on September 30, 2024.

Firm Central

WN Pro FC Custom FMS Seat
Custom Forms on Westlaw
Firm Central, Seat
Firm Central, MLA
WN Pro Custom FMS Seat
Firm Central Practice Management Suite - Basic Firm
Central Practice Management Suite – Premium
Firm Central Essential, Seat
Firm Central Essential with Accounting, Seat
Firm Central Premier
Firm Central Premier with Accounting, Seat

Time & Billing

Practice Suite Time and Billing Powered by eBillity
Time and Billing Powered by eBillity

Firm Central Additional Storage

DR FC Data Room Extended Core 2 GB
DR FC Included Storage 100 GB
DR Additional Storage 20 GB
DR Additional Storage 50 GB
DR Additional Storage 100 GB

Deadline Assistant

Firm Central Deadline Assistant
Firm Central with Deadline Assistant

Contact your Thomson Reuters Sales Rep or Client Manager prior to September 30, 2024, if you wish to continue utilizing the standalone version of Deadline Assistant.

eBillity

For customers that utilize Time & Billing via eBillity, you can continue using your Time Tracker by eBillity solution by updating your billing information in the pop-up when you next log in. After doing so, you will begin to be billed directly by eBillity. Please reach out to Joann Groninger jgroninger@ebillity.com with any questions.

Affinipay

For Firm Central customers that utilize Affinipay for customer billing, please contact Affinipay directly to ensure there is no interruption to service. Please reach out to LawPay with any questions. LawPay Sales: 866-376-0950; sales@lawpay.com or LawPay Support: 800-459-5798; support@lawpay.com

Why is Firm Central being sunset?	Thomson Reuters regularly assesses its product portfolio to optimize alignment toward our strategic direction as a content-driven technology company. As part of a recent review, Thomson Reuters has made the decision to discontinue our Firm Central product.
What does this sunset mean for me?	<p>What this means is that as of October 1, 2024, Firm Central, along with the secondary products listed above will no longer be usable for your Firm Management needs.</p> <p>After Oct 1, 2024, all information contained within Firm Central will be “read only”, meaning no additional data can be added. You will retain access to existing “read only” data via the Firm Central Dashboard for a period of 180 days.</p>
Can I renew my Firm Central subscription up until it is sunset?	<p>You can continue to renew your Firm Central subscription prior to September 30, 2024.</p> <p>Regardless of renewal status, on Oct 1, 2024, your Firm Central and any secondary subscriptions will be automatically lapsed from your contract and will be flipped to “read only” access via the Firm Central Dashboard.</p> <p>It is our recommendation that you evaluate alternative Firm management providers and begin to export/migrate your client data to whatever new platform you choose, as soon as possible.</p>
What happens if I cancel my Firm Central before I extract my data?	<p>Lapsing your Firm Central subscription prior to the full and complete extraction of your data IS NOT RECOMMENDED.</p> <p>If you do not export your data prior to September 30, 2024 (when it will be automatically lapsed) you will still be able to access and export “read only” data, but the process of exporting is much more cumbersome.</p>
After September 30, what happens to my data if it is not removed from Firm Central?	<p>Beginning October 1, 2024, all information within Firm Central will be “read only”, this means that you will be able to access existing data via the Firm Central Dashboard, but all editing capabilities will be prevented.</p> <p>You will still be able to access the self-serve data export portal until March 31, 2025, to export your client data. Your data will be saved for 180 days and is then subject to data purge.</p> <p>Please remember that State Bar Associations have various rules about the minimum amount of time to keep client data/files. Refer directly to your State Bar Association for definitive rules around client information retention.</p>
I want to lapse my Firm Central subscription; how do I do that?	Lapsing your Firm Central subscription prior to the full and complete extraction of your data IS NOT RECOMMENDED. You are able to lapse your Firm Central subscription at any time. Please call 1-800-977-9378 to begin that process.
If I try to access Firm Central online on October 1, what will happen?	You will still be able to access Firm Central on October 1, 2024, HOWEVER all information will be “read only”, this means you are not able to edit or add data to Firm Central.

DATA & DATA MIGRATION[Back to Quick Links](#)**How do I get my client and matter data out of Firm Central?**

You will need to extract data out of Firm Central via the existing self-serve portal within Firm Central prior to the official sunset date of September 30, 2024. Please remember to complete data extraction prior to lapsing/cancelling of Firm Central subscription.

The Self-Serve tool integrated within Firm Central should be used to export your data out of Firm Central. The below guide walks through the export process step by step.

[Data Extraction Guide](#)

Are there limitations to the amount or type of data that can be extracted from Firm Central?

Depending on the amount of data you have within Firm Central, it is possible that you will have to export data in multiple sessions.

There are also nuances to the types of data that is exportable on an ACTIVE Firm Central subscription versus a LAPSED Firm Central subscription, which is why we recommend exporting all of your data prior to lapsing your Firm Central subscription:

	Active Subscription Export Capabilities	Lapsed Subscription Export Capabilities
Open Matters	Individual Matters - Yes	Individual Matters – No Matter List - Yes
Closed Matters	Individual Matters - Yes	Individual Matters – No Matter List - Yes
Matter Notes	Yes	Yes
Research Folders	Yes	Yes
Calendar Event	Yes, 365 days at a time	Yes, 365 days at a time
Open Tasks	Yes	Yes – only from Home Page
Closed Tasks	Yes	Yes – only from Home Page
Private Tasks	Yes	Yes – only from Home Page
Documents	Yes	Yes – but takes additional steps to access and export
Annotations	Yes, if selected	Yes, if selected
Accounting	Yes	Yes
Time & Billing	Yes	Yes
Reporting	Yes	No
Deadline Assistant Events	Yes, as calendared	Yes, as calendared
Non-Deadline Assistant Events	Yes, as calendared	Yes, as calendared
Recurring Events	Yes, as calendared	Yes, as calendared
eBillility Records	On eBillility Servers	On eBillility Servers
Affinipay Records	On Affinipay Servers	On Affinipay Servers
Recycle Bin	Yes	Yes

I have made the decision to go to Clio for my Firm Management needs, what do I do now?

Clio will be able to assist you once your data is exported from Firm Central. It is CRITICAL that you do NOT LAPSE Firm Central until all of your data has been exported.

Please reach out to Clio directly at firmcentral@clio.com or by visiting www.clio.com/firmcentral

<p>I have signed a contract with Clio, will Thomson Reuters credit me for any months where I am paying for both platforms?</p>	<p>No.</p>
<p>I have made the decision to go to a different (non-Clio) Firm Management provider, what do I do now?</p>	<p>The first thing you want to do is to figure out your plan for extracting your data out of Firm Central.</p> <p>Most likely, your new provider will be able to assist with getting your exported data into their platform, however, you are still responsible for exporting your data out of Firm Central.</p> <p>This Data Extraction Guide will walk you through the export process. Please complete the data export process prior to lapsing Firm Central.</p>
<p>If I decide to not utilize a Firm Management platform going forward, do I still need to extract my data?</p>	<p>Yes, you will still need to extract your data to ensure you are in compliance with legal requirements on document retention.</p> <p>Each state has different requirements for retaining client data. Please check with your state Bar Association to determine what is required.</p> <p>Thomson Reuters is required to store your data for 180 days (beginning October 1, 2024) at which time the data can be purged from our systems.</p>
<p>I will be using a 3rd party to complete the data extraction and migration; will Thomson Reuters pay for that?</p>	<p>No.</p>
<p>I had to purchase extra data room storage for my Firm Central Data, what happens to that?</p>	<p>Those subscriptions will also be lapsed when you lapse Firm Central. You will still have access to the data via the Firm Central Dashboard tool in “read only” format.</p>

PRODUCT INTEGRATIONS

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I have Deadline Assistant integrated into my Firm Central subscription, what does this mean for me?

Deadline Assistant as a product is not going away.

If you have Deadline Assistant integrated within your Firm Central subscription, such as Firm Central Premier or Firm Central Premier with Accounting, you have the option to purchase the stand-alone version of Deadline Assistant.

If you decide to purchase the stand-alone version of Deadline Assistant, your data, including clients, matters and calendar events, will automatically appear in the standalone Deadline Assistant. No import is required. Please note, the calendar events that import are only the events generated by Deadline Assistant, no manually entered calendar events will be imported.

<p>I have a standalone subscription to Deadline Assistant and use it in tandem with Firm Central. What is going to happen when Firm Central goes away?</p>	<p>Deadline Assistant as a product is not going away.</p> <p>If you have a standalone Deadline Assistant product (meaning it is NOT included in your Firm Central subscription) there is no change to how to access or utilize the product.</p>
<p>I have a subscription to Westlaw and use it in tandem with Firm Central. What is going to happen when Firm Central goes away?</p>	<p>There will be no change to your Westlaw products in general, however, if you utilized Matter Folders in Firm Central, those will now be accessible within Westlaw only.</p>
<p>I have a subscription to Form Builder and use it in tandem with Firm Central. What is going to happen when Firm Central goes away?</p>	<p>While Firm Central and Form Builder work well together, one is not dependent on the other, therefore you are able to continue to use Form Builder, but please read and follow the below directions prior to taking any action.</p> <p>Make sure that the Firm Central admin DOES NOT empty the trash bin in Firm Central before the sunset, or those folders will be removed from Form Builder. The Firm Central Admin should also be careful not to deactivate any clients before Firm Central lapses or sunsets or those clients will show as closed in Form Builder.</p> <p>As part of Form Builder, you also had the ability to create Custom Forms. If you were accessing Custom Forms via Firm Central, you will lose that access. To retain those Custom Forms, it is recommended that you download these Custom Forms and re-create them within Form Builder.</p> <p>Firm Central customers who also have Form Builder had access to something called the Client Portal. The Client Portal feature will be retained and accessible within Form Builder. Any content previously shared between the firm and a client will remain and be accessible via Form Builder.</p>
<p>I had extra Data Room storage space; can I lapse that as well?</p>	<p>Yes, those subscriptions should also be lapsed when you lapse Firm Central. You will still have access to the data via the Firm Central Dashboard tool in “read only” format.</p>

EBILLITY & AFFINIPAY

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I utilize eBillity for my Time & Billing, how is that impacted by the Firm Central Sunset? Can I continue to use eBillity?

For customers that utilize Time & Billing via eBillity, you can continue using your Time Tracker by eBillity solution by updating your billing information in the pop-up when you next log in. After doing so, you will begin to be billed directly by eBillity. Please reach out to Joann Groninger jgroninger@ebillity.com to start this process

If I make the move to Clio, can I continue to use eBillity?	Yes, eBillity and Clio can integrate. Please work with your eBillity and/or Clio contact to ensure they are linked.
If I make the move to a different Firm Management platform, can I continue to use eBillity?	For customers that utilize Time & Billing via eBillity, you can continue using your Time Tracker by eBillity solution by updating your billing information in the pop-up when you next log in. After doing so, you will begin to be billed directly by eBillity. Please reach out to Joann Groninger jgroninger@ebillity.com with any questions.
I utilize Affinipay for my client billing, how is that impacted by the Firm Central Sunset? Can I continue to use Affinipay?	To continue using Affinipay, you will need to contract directly with them. They will be able to assist you with any data migration. Please reach out to LawPay with any questions. LawPay Sales: 866-376-0950; sales@lawpay.com or LawPay Support: 800-459-5798; support@lawpay.com
If I make the move to Clio, can I continue to use Affinipay?	Yes, however we are not able to speak to what this looks like or if there are integrations between Affinipay and Clio. Please work with your Affinipay and/or Clio contact.
If I make the move to a different Firm Management platform, can I continue to use Affinipay?	Please contact Affinipay to discuss your options. LawPay Sales: 866-376-0950; sales@lawpay.com or LawPay Support: 800-459-5798; support@lawpay.com

FIRM MANAGEMENT PROVIDERS

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We know how important Practice Management software is to the smooth operation of your firm.

We have selected Clio as our Preferred Transition Partner, and we encourage you to transition to their service. Hundreds of Firm Central customers have already transitioned to [Clio's practice management software](#).

Clio has extended their generous offer of 3 FREE months on any plan if you make the move by August 30th, 2024, to give Firm Central customers enough time to transition to the Clio platform.

Contact the Clio transition team via firmcentral@clio.com or visit www.clio.com/firmcentral to learn more about Clio. The team at Clio will ensure you have a smooth migration.

HELP

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Data Export User Guide

[Data Extraction Guide](#)

Technical

FCDatamigration@thomsonreuters.com

Support

Firm Central Tech Support: 888-287-8537

Firm Central Support Line: 800-977-9378

MISCELLANEOUS[Back to Quick Links](#)**I have the desktop Firm Central app – should I delete that from my computer?**

We recommend that you do not delete the Firm Central app until:

1. You have exported ALL of your data out of Firm Central
2. You have made a backup copy of all data exported out of Firm Central
3. Your data has been uploaded to your new Firm Management platform
4. You have confirmed the data in your new platform is accurate
5. You have lapsed your Firm Central subscription

If you can answer YES to the above, you can delete the Firm Central app from your desktop/computer.

When will Firm Central be removed from my bill?

First, we recommend that you do not lapse Firm Central until you have completed exporting all of your data.

If your Firm Central is within a ProFlex contract:

Since we bill in arrears, your Firm Central will still appear on your bill in the month following your requested lapse, but will be removed in any following billing statements.

For example, if you lapse Firm Central in June, your bill received in July (for June services) will still include Firm Central, but your August bill will not include Firm Central (since you didn't have Firm Central services in July).

Any active Firm Central, Time & Billing, eBillity, Affinipay, Extra Storage subscriptions as of October 1, 2024, will be automatically lapsed.

If Firm Central is a Standalone contract:

Your last bill for Firm Central will be your October bill (for September) usage. After October you will no longer receive a bill for Firm Central.

Will my bill from Thomson Reuters Change?

If Firm Central is in a ProFlex contract:

The value of Firm Central will be removed from your billing amount. Remember, we bill in arrears so the next bill after Firm Central is lapsed will still include Firm Central charges. The following month will not include Firm Central or corresponding charges.

For example, if you lapse Firm Central in June, your July bill will still include Firm Central charges, but your August bill will not include Firm Central charges.

If Firm Central is a standalone contract:

Once lapsed, you will receive a final bill for Firm Central and then no additional bills.