



Thomson Reuters Legal Tracker

Timekeeper Rate Review Guide

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Overview

Timekeeper Rate Review (TKRR) is a powerful tool for controlling your firms' proposed timekeeper rates. The tool allows:

- A new workflow whereby you standardize how and when your firms propose rate increases
- Workflows that establish processes for adding new timekeepers
- Enhanced enforcement of your policies regarding rate increases
- Reportable savings
- Reportable diversity and inclusion information of timekeepers.

Timekeeper Rate Review was developed in conjunction with the American Express corporate legal department — one of the world's top legal departments. Here is what one Thomson Reuters® Legal Tracker client had to say about this tool:

"Legal Tracker's Timekeeper Rate Review allowed us to instantly see that one of our firms was proposing an overall 10% rate increase. We rejected the rate sheet and successfully negotiated a 1% rate decrease with this firm. Timekeeper Rate Review really helped us negotiate much quicker with our firms without having to do our own calculations."

This guide provides the specifics behind implementing this tool and tips for best practices. It also establishes steps and guidelines on how your legal department might implement TKRR. By following this guide, your legal department can fully harness the value of the TKRR module by gaining enhanced visibility into timekeeper rates and reporting on savings from timekeeper discounts.

Step 1: Key Considerations of Timekeeper Rate Review

Before implementing any changes, it is imperative that you review your current policies and workflows regarding rate proposals from your firms. Here are some questions to ask:

- What is our current process when a firm proposes a rate increase?
- Who currently negotiates and approves proposed timekeeper rates?
- After we agree on a rate, how are negotiated rates communicated to invoice reviewers?
- How do our invoice reviewers enforce these negotiated rates against pending invoices?
- How do we currently monitor invoice reviewers to ensure enforcement of our rate policies?
- What reports do we currently generate to report savings from negotiated timekeeper rates?
- What documentation do we have regarding these processes?

The following changes may be necessary to maximize the power of Timekeeper Rate Review:

- **Standardize processes:** To maximize use of this tool, you will need to standardize when your firms can submit proposed rate increases, how rates and discounts are negotiated (and by whom), and how your policies will be enforced.
- **Educate firms:** You may need to educate your firms on how to properly submit a rate sheet. You may also need to monitor and enforce proper LEDES invoicing throughout the year.
- **Enforce policies:** Exceptions often undermine the rule. To maximize the value of Timekeeper Rate Review, rate sheets should include all timekeepers expected to bill **your company** in the upcoming year. Also, the agreed rates must be enforced throughout the upcoming year.
- **Establish key dates and a timeline:** When enabling TKRR, it is best to create a plan that establishes key dates and deadlines, both internally within your legal department and externally among firms. A proposed implementation schedule of TKRR is provided in Appendix A.
- **Communication:** It is recommended that you send communication about the requirements of the Timekeeper Rate Review module, both internally within your legal department and externally to your firms. A document template of sample internal communication is provided in Appendix B, and a document template for external communication is provided in Appendix C, which you can customize to your requirements. This notice should be used to set expectations within your legal department as you implement this tool.
- **Set the tone from the top:** Change is challenging in many organizations. Some firms will resist this new workflow. The voice from the leadership team in your legal department will be critical to the effective implementation of Timekeeper Rate Review.
- **Ongoing management:** Enabling TKRR requires ongoing management. It's best to develop a long-term plan regarding how to manage this tool. This may include planning who within the legal department will approve new timekeeper rates, as well as who will manage timekeeper rate increases. It is best to develop clear policies on what types of rate increases will be accepted, as well as processes for negotiating timekeeper rates.
- **Review diversity and inclusion requirements:** With TKRR, companies can require law firms to provide comprehensive diversity and inclusion information when the firms are submitting timekeepers. This information is used to track outside counsel diversity based on common categories of diversity widely used within the field of legal operations. When enabling TKRR, it is best to define diversity requirements and choose which diversity categories to include on rate sheets. Legal departments can then use diversity data to make outside counsel selection and pricing decisions.

Additional resources on the key considerations of timekeeper rate review:

[Timekeeper Rate Review Introduction](#)

[TKRR video tutorial on ONESOURCE University](#)

Appendix A: Timekeeper Rate Review Implementation Timeline.

Step 2: Enable Timekeeper Rate Review Functionality and Configure Settings

Company system administrators can enable the TKRR module by navigating to the Settings menu, and then clicking on the Timekeeper Classifications, Rates, and Reviewers link under the **eBilling and Financial Setup** heading. For detailed instructions, you can review, [Enable and Configure Timekeeper Rate Review](#) in the Learning Center.

Determining who can approve/modify timekeeper rates.

Once TKRR is enabled, company system administrators will need to select who can approve/modify timekeeper rates. There are two options for this setting — 1) timekeeper rate reviewers only; or 2) timekeeper rate reviewers and **invoice** approvers (during the invoice approval process).

Rates approved by TK reviewers only: With this option, each audit flag for a new timekeeper (a timekeeper that was not included on the approved rate sheet) or timekeeper rate increase (an existing timekeeper, but now with a rate higher than on the rate sheet) will be delivered to your rate reviewers first. The invoice will then pass to your invoice approvers or BGR only after your rate reviewers have handled all audits.

Rates approved by TK rate reviewers and invoice approvers: With this option, each audit flag for a new timekeeper or rate increase will appear on the dashboard for both your rate reviewers and initial invoice approvers (e.g., Billing Guideline Reviewer or Lead Company Person). Note that if the initial invoice approver clears the audit, it will no longer be available to the rate reviewer, but not vice versa.

Best Practice

These two options create different workflows. It is critical to understand the difference between these options and the context in which they should be used.

- **TK rate reviewers only:** This option centralizes (or bottlenecks) the review of audit flags for rate increases and new timekeepers. By restricting the review of these audit flags to a few individuals in your legal department, you ensure the greatest enforcement of your policies regarding these audit flags. A few cautions:
 - a. If rate reviewers are not sure how to handle an audit flag, they will need to get clarification from a decision maker (an additional process).
 - b. As noted above, if rate reviewers clear an audit flag, subsequent invoice reviewers will not be able to override the rate reviewer's decision regarding that audit flag.
 - c. If rate reviewers are absent for an extended period of time, invoices with audit flags would be stuck in the rate reviewer queue during that time.
 - d. If using this approach, enabling timekeeper audits to auto-reject invoices with new timekeepers and auto-reducing timekeeper rate changes to currently approved rate will substantially eliminate invoice audit bottlenecks.
- **TK rate reviewers and invoice approvers:** This option allows your existing invoice approval workflows to remain (and does not bottleneck the invoice review process with rate reviewers). If you are confident that your current invoice approvers will enforce your policies regarding rate increases and new timekeepers, you may want to use this second option.

Selecting TK rate reviewers

1. Under Rate Reviewers, select at least one rate reviewer who will be responsible for approving your firms' rate sheets.

Best Practice

You can select an unlimited number of rate reviewers. Your rate reviewers should be individuals in the legal department who have authority to approve timekeeper rates (not just individuals who serve an administrative function). Ideally, your rate reviewers should plan on signing into Legal Tracker to review the rate sheets (rather than having an administrator print the rate sheet information for their review). By choosing a tighter control over rate reviewers, you will be able to assign pending timekeeper rates to individuals in the legal department for review, which means not every person who approves timekeeper rates is required to be a full Rate Reviewer.

Requiring potential duplicate timekeepers to be addressed: Companies can require law firms to address any potential duplicate timekeepers that are being entered into Legal Tracker. Duplicate timekeepers refer to timekeeper IDs that differ only by the inclusion or exclusion of leading zeros. Enabling this requirement of addressing duplicate timekeepers requires the law firm users to validate that the potential duplicate timekeepers are unique or select that the timekeepers are duplicates.

Diversity and inclusion settings: Companies can request law firms to provide comprehensive diversity and inclusion information when submitting their timekeepers. This diversity and inclusion information that can be tracked includes the following categories:

- Gender
- Ethnicity
- Military status
- Disability
- LGBTQ+ affiliation

Under the Timekeeper Classifications, Rates, and Reviewers page, company system administrators must first choose whether to include each of the categories on the timekeeper rate sheet. If the category is included on the rate sheet, the company system administrators will then be prompted to select whether the specific diversity category should be a hard requirements when submitting a rate sheet, or if it should be optional for the firm to submit the particular diversity category on the rate sheet. Company system administrators will also be prompted to select the countries in which each diversity category appears on the rate sheet.

Timekeeper audit options for new timekeepers and timekeeper rate changes: Legal Tracker allows for company system administrators to set up timekeeper audits when a new timekeeper appears on an invoice, as well as when there are timekeeper rate changes on an invoice. Through these audits, Legal Tracker can be set up to flag any LEDES invoices that contain new timekeeper or modified timekeeper rate audit violations, or you can specify a rule to automatically reject a rate or an invoice

Best Practice

Enable auto-reduction of timekeeper rate changes to approved rates to reduce the need to review invoice generated audits. This is a huge time saver and helps to enforce the elimination of mid-term rate increases.

Additional resources on enabling the Timekeeper Rate Review Functionality:

[Setting Up Timekeeper Rate Review](#)

[Define Timekeeper Audit Rules](#)

[Create a Timekeeper Rate Sheet Online](#)

Step 3: Reviewing Timekeeper Rates - Going Live

Your rate reviewers can view pending rates by clicking on the dashboard alert for **TK Pending Rates**, which will open the **Pending Rates** page of the **Rates** tab. Rate reviewers can also access the **Rates** tab by navigating to Left Menu > \$ Financial > Rates and then choosing the sub-tab. Within the **Rates** tab, note that there are five pages, each page serving a specific purpose:

- Pending Rates
- TK Audits
- Rates by Firm
- Rate Sheets
- Rate Sheet Intake

Pending Rates

This page allows rate reviewers to see all pending rates in one place. By default, the pending rates are grouped by law firm name. From this page, a timekeeper rate reviewer or an assigned reviewer can take the following actions: 1) accept the proposed timekeeper rate; 2) reject the proposed timekeeper rate; or 3) edit the proposed timekeeper rate.

Rejecting and editing proposed rates: If a timekeeper's rate is rejected, the reviewer will be required to provide a rejection comment, which will be shared with the law firm. When editing a proposed timekeeper rate, the reviewer has the option to edit the effective date or effective rate. The reviewer also has the option to provide internal comments regarding a timekeeper's rate. These are comments that are not visible to firms and that can only be seen by internal users.

Best Practice

- Double-check that the effective date is the date you want the proposed rates to become effective. You can backdate the effective date of a proposed timekeeper rate to a date that has already passed. If you know that negotiations are still underway with a firm and that the timekeeper rates will be backdated, you may wish to hold off on reviewing invoices from that firm until the pending timekeeper rates are approved. Also note: if you approve a timekeeper rate and the effective date passes, you can no longer edit the effective date. So, this date should be one of the first things you review!
- If you backdate the effective dates for timekeeper rates you approve, pending timekeeper audits may be cleared if the rates on the invoices are the same as those you approve, as long as the billing period end date of the invoice is after the changed effective date.

Selecting the same action for multiple timekeepers: To take the same action on multiple timekeepers, a timekeeper rate reviewer or assigned reviewer can select one or more pending TK rates to take action. To select rows adjacent to another, click on a row and press Shift while clicking on a different row. To select multiple rows that are non-adjacent, click on a row and press Ctrl while clicking the other row. You also can take action on all pending timekeepers by choosing the **Select All** on the page option in the menu ribbon.

Assign or remove assigned reviewer to a proposed timekeeper rate: Timekeeper rate reviewers have the option to change the assigned reviewer or remove an assigned reviewer of a timekeeper rate. To complete this action, click on the downward arrow next to the word **ACCEPT**, which is located above the timekeeper's name. A reminder e-mail can also be sent to a timekeeper rate reviewer by clicking **Send Reminder** on the top toolbar. Company system administrators also have the ability to create assignment rules, which allow for rates to automatically be assigned for a specific reviewer under certain conditions. To create or edit assignment rules, click on the **Assignment Rules** button on the top tool bar of the **Pending Rates** page.

Best Practice

If assigning a number of rates to a reviewer, you can edit the rates to include an internal comment. This internal comment is available to the assigned reviewer and can be used to provide additional information for the assigned reviewer.

Note: Even if a rate has been assigned to a specific reviewer, the TK reviewer still has the ability to approve the pending rate. If the previously assigned reviewer is not reviewing the rate, but a different reviewer should, the assigned reviewer can be removed and replaced with a different assigned reviewer.

TK Audits

The Timekeeper Audit page highlights the timekeeper-related invoice audits. From this page, TK reviewers have the ability to review new timekeepers and timekeeper rate changes that come through invoices rather than rate sheets.

Rates By Firm

This page allows you to see all approved rates for a single firm for a specified effective date at the same time. The information displayed on the page will show you the timekeeper information for each timekeeper rate, including the Base Rate, Discount, Effective Rate, and the Legal Tracker Index rate.

Rate Sheets

This page allows you to see the firm submitted rate sheets. These rate sheets are maintained for reference only.

Rate Sheet Intake

This page allows you to submit rate sheets on behalf of your firm or vendor, either by uploading a file or creating a rate sheet online. Please note that if you choose to submit a rate sheet on behalf of a firm or vendor, the rates will be deemed approved and will not go through the rate approval process.

Additional Resources:

[Review Pending Timekeeper Rates](#)

[Removing Timekeeper Rates](#)

[Review Timekeeper Rate Changes Submitted in Invoices](#)

Step 4: Using Index and Forecast Data to Negotiate with Firms

The rate sheet provides powerful information for fee negotiations with your firms, including benchmarks and forecasts related to individual timekeepers.

Demographic information. Note the demographic information in the **Timekeeper Data** section, which includes the timekeeper's metro area, the most frequently invoiced matter type, employment classification, and years of experience. Additionally, ethnicity and gender are available for each timekeeper by expanding the row to see the detail. Click the arrow on each row to expand to see more information. All timekeeper data is provided by the law firm posting the rate sheet into Legal Tracker.

Default vs. matter-specific rates. A default rate is the system-wide rate for a timekeeper. A matter-specific rate is a timekeeper's rate for a specific matter only. You can determine whether a rate is default or matter-specific by looking in the **Matter Data** section. If the column displays a dash, the proposed rate is the default rate against which most invoices will be audited. If the column contains a matter name, invoices for that matter only will be audited against that rate.

Proposed rates. Here, you can see the proposed rate information, include the date the rate was posted, effective date, base rate, discount, and effective rate. This information is provided by the law firm when they post the rate sheet into Legal Tracker.

Rate analysis. This section allows you to see the timekeeper's current rate (if any), the percentage change, hours last year, fees next year, and fees last year. These fields are generated by Legal Tracker and have the following rules associated to them.

- **Current rate** – The current approved rate for the timekeeper at the date when the rate was posed into Legal Tracker. This rate is also linked to display the timekeeper rate history dialog, where you can see all of the timekeeper's previously approved rates.
- **Percentage change** – The percentage shown is the difference between the current rate and the proposed effective rate.
- **Hours last year** – The hours worked by the timekeeper from approved invoices from the proposed Effective Date minus one year.
- **Index** – The index billing rate for that combination of metro area, matter type, and timekeeper classification. That is, for each timekeeper, Legal Tracker displays the average rate for similarly situated timekeepers. If the index rate is significantly different from the effective rate, you might want to adjust the rate or investigate further.
- **Percentile** – Legal Tracker displays a weighted value based on the index factors—metro area, matter type, and timekeeper classification—plus hours worked. These weighted values are ranked into percentiles, and each timekeeper is assigned to a percentile group.
- **Fees last year** – The sum of all fee line items for the TK on approved invoices between the proposed Effective Date minus one year.
- **Fees next year** – The projected fees from the 12-month period after the effective date. Legal Tracker estimates fees that your company would pay if the timekeeper works the same number of hours at the new effective rate.

Best Practice

- These are the values most corporate legal departments are using to determine whether proposed rates should be approved, so they have been made available for each timekeeper rate displayed.
- The index is determined by a timekeeper's metro area, matter type, and timekeeper classification. The index DOES NOT take years of experience into account. So, your rate reviewers may want to take years of experience into account when comparing the proposed rate against the index.

Step 5: Reporting

Your invoice approvers should know what to look for on an invoice, which varies based on your fee arrangements with your firms (e.g., standard hourly rates, discounted hourly rates, blended fees, or flat fees). On at least a quarterly basis, your Legal Tracker Coordinator should be running two reports, **Audit Override Export** and **Timekeeper Rates**, to be reviewed by your legal department's leadership team.

Audit Override Export

This report displays how your invoice approvers have handled each audit flag on the invoices selected in your report criteria. To run this report:

1. Navigate to **Reports**, and then select the report **Audit Override Export**.
2. Select the report criteria for the invoice audits you want to review under **Step 2 - Criteria**.
3. For **Step 3 – Generate Report**, select **Export CSV**.

Note: You can also save your report criteria by clicking the checkbox next to **Save Report Criteria** and providing the name of the report in **Save Report Criteria As**.

4. Review the CSV file.

Best Practice

Pay close attention to columns A (Firm), G (Audit Type), H (Expense or Timekeeper), I (Audit Approver), and R (Total Difference). Note that the "Total Difference" is the variance between the guideline amount in Legal Tracker and the amount approved. This report tells you which firms have submitted invoices with rates (and expenses) that do not confirm with your billing guidelines. It also tells you which invoice approvers have allowed non-conforming rates (and expenses). Review this report regularly!

Timekeeper Rates Report

This report shows what your current timekeeper rates are, who approved those rates, when those rates were approved, and whether the rate is the Legal Tracker default rate or a matter-specific rate. This report also shows how the rate was approved (during rate review or on an invoice). To run this report:

1. Click the **Reports** button, and then click the report **Timekeeper Rates**.
2. Select the report criteria for the invoice audits you want to review.
3. Click **Run**.

Note: To save your report criteria, select **Save Report Criteria** and name the report in the **Save Report Criteria As** box.

4. Review the report, noting the following columns:

- **Edit Rate:** If you are a company system administrator or timekeeper rate reviewer, you will see [Edit Rate] in the first column of each row. You can click this link to edit the rate or effective date for the rate in Legal Tracker.
- **Timekeeper/Classification/Timekeeper ID:** View the timekeeper name and classification (partner, associate, paralegal, other timekeeper, etc.).
- **Firm/Office:** View the firm and office from which the timekeeper bills your company.
- **Effective Rate/Prior Rate:** View the current and prior timekeeper rate.

- **Approver/Approval Date:** View the invoice approver who approved the timekeeper's current rate and the date when the current rate was approved.
- **Matter Name/Matter Type (Template):** Note that there is a difference between the gray and white rows in the report. The gray rows display the timekeeper's default rate (or system rate), if any, and the white rows display the timekeeper's matter-specific rates (and the associated matter type).

Best Practice

You can edit any rates that have been improperly increased here, which will reset the threshold for invoice audits on invoices your firms post moving forward. This may be easier than asking a firm to submit a whole new rate sheet to adjust a few timekeeper rates that may have "crept up" throughout the year. Review this report regularly!

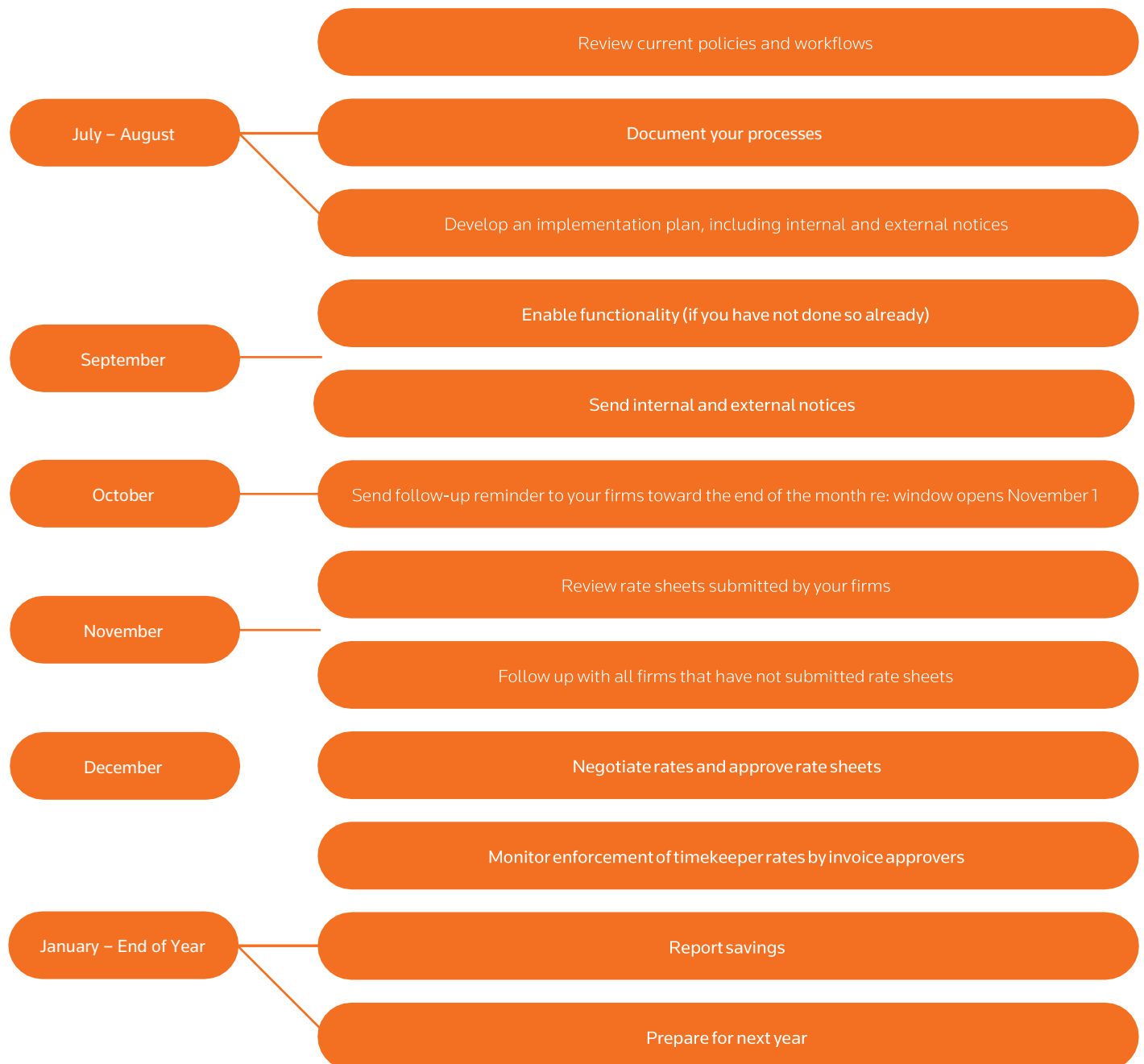
Report Savings

One pre-configured report you should run on a regular basis is the Invoice Reduction Export. This report shows amounts for reductions to fees (Column K), expenses (Column L), and taxes (Column M) for invoices during a given time period. You can also see who made the reduction (firm or company in report criteria, see Column H in the report) and the basis of the reduction (see Columns N-P). This report is a great starting point for measuring savings captured by your invoice reviewers.

You can now create your own savings reports because the rate sheet data is now available in Report Builder. You should contact your Account Manager with any reporting questions or feedback.

Appendix A: Timekeeper Rate Review Implementation Timeline

The following is a proposed implementation timeline for a client that intends to enforce new rates beginning January 1 of the upcoming year:



Appendix B: Internal Notice

The following is a template for notifying your legal department about Timekeeper Rate Review:

Effective for billings for services provided in [month, year] we are implementing Legal Tracker Timekeeper Rate Review functionality. This functionality allows us to: (1) review law firm's proposed timekeeper rates in one convenient table; (2) collect more information about their timekeepers so we can more completely, accurately and fairly assess their rates relative to benchmark information and rates of other firms we use (for rate negotiations); (3) gain better insight into their timekeepers whom we might want to engage (e.g. for diversity and inclusion or specialty services); (4) collect more detailed information for better budgeting and identifying ineffective timekeeper resourcing on matters; and (5) allow us to more easily report on savings from negotiated discounts.

Timekeeper Rate Review creates a new workflow for law firm rate approvals. Instead of reviewing and approving rates on invoices we will be approving rates on specially formatted Rate Sheets submitted by our firms. These Rate Sheets also contain other valuable timekeeper information (e.g. years of experience, geographical location, diversity and inclusion information) which we can use for other purposes. Including rate negotiations.

We will be advising our firms of our plan to require them to submit Rate Sheets with this new timekeeper information (see attached correspondence example). Please note that our Billing Policies state the following with respect to requirements for our firms to submit Rate Sheet and rate information for their timekeepers:

[Extract from Billing Guidelines to be entered here and commentary on the strict enforcement of the Guidelines (e.g. new timekeepers must be approved on a rate sheet before they're included on an invoice, no retractive application of rate increase for late submission of Rate Sheets, must notify specific contact for any requests to increase rates, only one rate increase request per year, etc.)]

Insert further guidance (i.e. the rate approval playbook) on the Rate Sheet approval workflow to be implemented with Legal Tracker (e.g. who approves, time for approval, escalation policy, additional analysis to be provided, etc.)

Please note this new workflow will facilitate significant cost savings and operational efficiencies for the legal department, more accurate financial forecasting. We appreciate your cooperation in this undertaking. Any questions should be directed to *[name of General Counsel or other point of contact within legal department]*.

Appendix C: External Notice

The template below is a suggested message you can send to your firms to introduce the new process and requirements for reviewing rate sheets. One of the most important things to focus on in communication with your firms is the effective date. The effective date is the date your firm's proposed rates will be applied to that firm's invoices. Note that Legal Tracker compares the billing period end date on the invoice with the effective date for a rate increase.

Best Practice

The effective date should be the first day of your fiscal year (e.g., January 1, 2021). Note that any LEDES invoices posted during your upcoming fiscal year (e.g., the month of January 2021) with a billing period end date falling during the prior fiscal year (e.g., December 2020) will be audited against the 2020 rates. In other words, your firms will not receive 2021 rate increases for work performed in 2020!

Timekeeper Rate Review - Rate Sheet Submission Requirement

To: Law Firm

From: Company

Re: Timekeeper Rate Sheet Upload Requirement

This notice is to inform you that our Legal Department has decided to enable the Timekeeper Rate Sheet Review functionality in Legal Tracker. This functionality allows us to: (1) review your firm's proposed timekeeper rates in one convenient table; (2) collect more information about your timekeepers so that we can more completely, accurately and fairly assess your rates relative to benchmark information and those of other firms; 3) gain better insight into your timekeepers whom we might want to engage (e.g. for diversity and inclusion or specialty services) and; 4) collect more detailed information to better budget and assess effective timekeeper resourcing on matters.

Deadline for Submission & Effective Date & SCOPE

We are requiring your firm to submit a Timekeeper Rate Sheet in Legal Tracker for all relevant timekeepers no later than **[insert date]**. Relevant timekeepers include those timekeepers who have previously provided services to us, those who you reasonably expect to provide services in the upcoming year and any timekeepers who you believe we might want to engage because of their diversity or special expertise which aligns to our key needs. The rates you submit should be your currently approved rates (or, if Rate Sheets are being rolled out to firms in the context of a proposed rate increase insert [The rates you submit should be the new rates you propose to take effect on [insert effective date-e.g., January 1, [year]]].

TIMEKEEPER INFORMATION REQUIRED:

- 1) Fields required in the Timekeeper Rate Sheet - File Specifications referenced below including the information immediately below in this section.
- 2) Base Rate and Effective Rate for each Timekeeper (the difference is the discount you are offering). If we have agreed to a tiered volume discount structure please contact [insert company contact name – e.g., **Legal Tracker Coordinator**] for instructions on how to submit rates.
- 3) Years of Experience – this should be the total years of legal experience for Partners, Associates, Of-Counsel and Paralegals. This will need to be updated each year.

4) Diversity and Inclusion information (for specified countries):

- [Choose ONE of the following options, depending on your company's requirements]:
 - o [Option 1] None
 - o [Option 2] Gender and ethnicity
 - o [Option 3] Gender, ethnicity, disability, military status, LGBTQ+

NOTE: Please refer to our Billing Guidelines (link at the bottom of each page in Legal Tracker) for full information and instructions regarding your responsibilities to provide timekeeper information. Failure to follow the instructions and prescribed processes in our Billing Guidelines may result in a reduction in your approved fees. Your firm will not see or receive any Legal Tracker dashboard alerts or email notifications relating to Timekeeper Rate Sheet requirements or deadlines.

Process

Step 1: Submitting the Timekeeper Rate Sheet (Select Method)

Option #1: Create Rate Sheet Outside of Legal Tracker and then Upload File

This option requires two steps. First, create a rate sheet spreadsheet that meets Legal Tracker's Rate Sheet Specification Requirements (See [Timekeeper Rate Sheet - File Specifications](#))

Second, upload the file.

1. Click the **Billing** left menu icon, and then click the **Timekeepers** tab.
2. Click **Post Rate Sheet** toolbar button.
3. Select Upload a file and click **Next**.
4. Click **browse** to select the rate sheet file.
5. Select one of the following file types:
 - **CSV (comma separated value)**
 - Text file (tab delimited)
 - Text file ("pipe" delimited)
6. Select an effective date for the proposed rates. See above (Deadline for Submission) for the effective date.
7. Click **Next**.
8. Review your timekeeper rate sheet and click **Next**.

NOTE: If Legal Tracker detected errors in the rate sheet file, they will be listed under **Errors were found**. Correct the errors and repeat steps 2 through 7. For troubleshooting information, follow the instructions on your screen.
9. Optional: Even if the upload is successful, you may choose to modify the information in the rate sheet file. In that case, click **Cancel**. After you make the necessary changes, repeat this process.

Option #2: Create Online

1. Click the **Billing** left menu icon, and then click the **Timekeepers** tab.
2. Click the **Post Rate Sheet** toolbar button.
3. Select Create online and click **Next**.
4. Select an effective date for the proposed rates. See above (Deadline for Submission) for the effective date.
5. You can either auto fill the rate sheet with the current default rates for timekeepers (if any) or create an empty rate sheet. Click **Create rate sheet**.

6. Complete all required fields. Click **Add Timekeeper** to add additional timekeepers.

7. Click **Next**.

NOTE: If Legal Tracker detected errors in the rate sheet file, they will be listed under **Errors were found**.

Correct the errors and repeat step 6.

8. Review your timekeeper rate sheet and click Next.

Step 2: Submitting the Timekeeper Rate Sheet

After you have uploaded or created online the timekeeper rate sheet, and after you have reviewed the information in the rate sheet file for completeness and accuracy, click Submit. Legal Tracker will notify our designated Timekeeper Rate Reviewers that the rate sheet is ready for review. Please note that we expect you to provide complete and accurate timekeeper information in accordance with our instructions. We may reject all timekeepers on a rate sheet where we find you have not performed the necessary quality checks.

See Legal Tracker Help Pages for More Information

Please refer to the [Legal Tracker Law Firm Learning Center](#) for more information relating to the timekeeper rate sheet specifications and submission process. Click the question mark icon in the left menu of any Legal Tracker screen to be taken to the Learning Center and the Law Firm Learning Center link, where you can find help topics for "Timekeeper" under the Workflow Guidance heading.

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