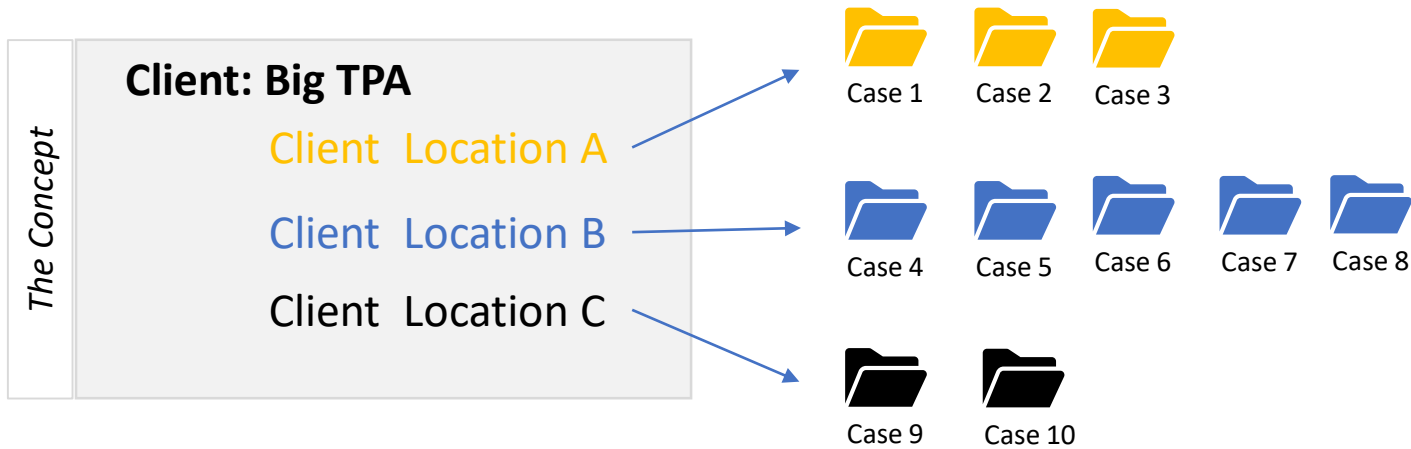


casefriend

A horizontal line with five circular markers. The first two markers are green, the next two are orange, and the last one is grey. A small green location pin icon is positioned above the letter 'i' in the word 'casefriend'.

Client Setup Guide

Clients are structured in Casefriend to support the enforcement of common billing guidelines across all Client Locations, and billing rates that differ by client location.



*In this example, the law firm is handling 10 cases for **Big TPA** across 3 Locations with different rates. Big TPA also limits billing to 10 hours per day across all locations. Any billings greater than 10 hours/day will be cut by Big TPA!*

In Practice

By creating a Client "Group" in Casefriend called **Big TPA** and setting the *Max Billable Hours per day* to 10, will allow your attorneys to know when they have exceeded that threshold.

The screenshot shows the Casefriend interface. At the top, there's a navigation bar with 'Cases', 'Billing', 'Reports', and 'Contacts'. Below that is a 'Clients' section with a 'New Client' button and a search bar. A table lists clients with columns for Client Name, Short Name, Client Type, Active Files, Closed Files, and Time Entry. The 'Big TPA' client is highlighted, showing 10 active files and \$0.00 in time entry. A settings modal is open for 'Big TPA', showing various configuration options. A yellow box highlights the 'Max Billable Hours per day' field, which is set to 10. A hand icon points to the 'Big TPA' row in the table.

Client Name	Short Name	Client Type	Active Files	Closed Files	Time Entry
Big TPA	BT	TPA	10	0	\$0.00
Location A 1 Spring St, Seattle, WA 98104			3	0	\$0
Location B 1 Spring St, Seattle, WA 98104			5	0	\$0
Location C 1 Spring St, Seattle, WA 98104			2	0	\$0

Work comp clients can be difficult to manage with multiple locations and multiple billing rules. Casefriend organizes your client's locations into Groups. So Client wide billing rules can be enforced by having Client Locations inherit Client Billing Rules. Billing Rules can be customized at the Client Location level.

Client group Naming Fields

- 1 Client Type:** Most of your Clients will likely be a TPA. Insurers are added to individual cases.
- 2 Client Name:** ... is typically, the familiar name your client and all its locations are known by, and is considered the **Client Group**.
Examples: AmTrust, Zurich
- 3 Client Name Short:** This is used for quick reference throughout Casefriend
- 4 Billing Rules:** Billing Rules which apply to every case regardless of Location are set at the Client Group level
Examples: Max Billable Hours per day, Alert when Billable Hours reach

1 Client Type •
 Insurer TPA Company Individual

2 Client Name •
Big TPA

3 Client Name Short
BT

4 Billing Rules

casefriend

Cases Billing Reports | Contacts Tools Settings

09:35:02 AM Kevin Flynn

Clients Total (40)

New Client Search by Client Name, short name

Client Name	Short Name	Client Type	Active Files	Closed Files	Time Entry
Big TPA	BT	TPA	10	0	\$0.00
Location A 1 Spring St, Seattle, WA 98104			3	0	\$0
Location B 1 Spring St, Seattle, WA 98104			5	0	\$0
Location C 1 Spring St, Seattle, WA 98104			2	0	\$0
+ Add a Location					

Client and Client Location naming ensures a consistent experience for your admins and your attorneys.

Client Location Naming Fields

- 1 **Client Name:** This is inherited from the Client and is un-editable
- 2 **Location Name:** Cases are assigned to Client Locations. Using the name your new files team, billing team and attorneys most frequently use is recommended.
Examples: AmTrust San Diego, Zurich LA
- 3 **Client Name Short:** This is used for quick reference throughout Casefriend
- 4 **Billing Rules:** Location specific Billing Rules can be set here

Client Name	Short Name	Client Type	Active Files	Closed Files	Time Entry
Big TPA	BT	TPA	10	0	\$0.00
Location A 1 Spring St, Seattle, WA 98104			3	0	\$0
Location B 1 Spring St, Seattle, WA 98104			5	0	\$0
Location C 1 Spring St, Seattle, WA 98104			2	0	\$0
+ Add a Location					

Grouping Clients and Locations simplifies Client selection when adding a new Case, and prevents duplicates

The screenshot shows the 'New Workers Compensation California Case' form in the Casefriend application. The 'Client' dropdown menu is open, displaying a list of suggestions. Four blue boxes with arrows point to specific parts of the suggestions:

- Client:** Points to the text 'Big TPA Location A: TPA BT'.
- Client Location:** Points to the text 'TPA BT'.
- Client Type:** Points to the text 'TPA BTB'.
- Short Name:** Points to the text 'TPA BTC'.

The background shows the 'My Caseload' section with 89 cases and a table of case details. The table has columns for 'Updated', 'Case Name', 'Report', 'Depo', 'MPN', and 'Panel'. The 'Report' column contains values 267, 262, 209, and 255.

Client

Client Location

Client Type

Short Name

Tip
Type in the first few letters of a Client name for suggestions.

In this example, we typed "big" and the list was reduced to client with the "big" in their name.

If you need to change a Case/Client assignment, the Casefriend naming scheme allows for easy selection

The screenshot displays the Casefriend web application interface. At the top, the 'casefriend' logo is on the left, and a search bar, calendar icons, a notification bell, and the user's name 'Kevin Flynn' with a profile picture are on the right. Below the header is a navigation menu with 'Cases', 'Billing', 'Reports', 'Contacts', 'Tools', and 'Settings'. The main content area shows a 'Timeline | Info' section for a case titled 'Barrett, Syd v Disney'. A dropdown menu is open, showing options like 'Medical', 'Hearing', 'Deposition', 'Subpoena', and 'Liens'. Below this, a 'Client' dropdown menu is highlighted with a blue box. The dropdown menu contains three entries: 'Big TPA Location A: TPA BT', 'Big TPA Location B: TPA BTB', and 'Big TPA Location C: TPA BTC'. Four callout boxes with arrows point to specific parts of the dropdown menu: 'Client Type' points to the 'TPA' part of the first entry; 'Client' points to the 'Big' part of the first entry; 'Client Location' points to the 'TPA Location A' part of the first entry; and 'Short Name' points to the 'TPA BT' part of the first entry. Below the dropdown menu, there are fields for 'Case Name', 'Case Type', 'Billing type', and 'Ca'. Below these fields is an 'Optional:' section with fields for 'Paralegal', 'Firm Location (UAN)', 'Billing Claim #', and 'Claim DOL'.

Client Billing Rules

When you set-up a Client Billing rules are populated with your firm's default Billing Rules. Most Clients, however, will have custom Billing Rules. You can apply customized Billing Rules from the Billing Rules tab

Billing Rules Fields

Billing template: Select the default option for how the Client prefers to have their invoices delivered (Client Group and Locations. *Applies to Clients & Locations*)

Billing Type: Hourly, Contingent or Pro Bono. This is set to Hourly by default. *Applies to Clients & Locations*

Frequency: Select how often the Client wants to be billed. At the end of each month or a number of days after case opened date. *Applies to Clients & Locations*

Number of Days in Billing Cycle: If Frequency is By Days, enter the number of days for billing here. *Applies to Clients & Locations*

Time Entry Character Limit: Limit Time Entry descriptions to the Client's or Firm's preference to reduce cuts. *Applies to Clients & Locations*

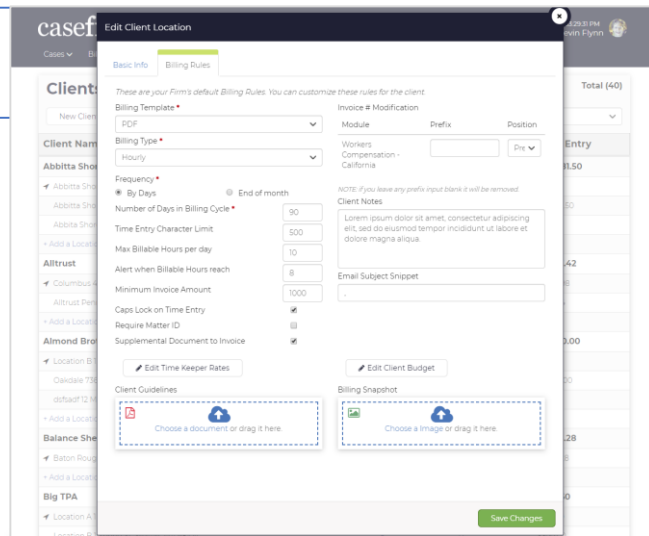
Max Billable Hours per day: Reduce cuts by capping the amount of hours your timekeepers can bill per day per Client preferences. *Applies to Clients only*

Alert when Billable Hours reach: Provide your timekeepers a visual display of in the My Billing when daily billables reach a threshold. *Applies to Clients only*

Minimum Invoice Amount: Set the Client's preferred minimum invoice amount

Edit Time Keeper Rates: Set the Rates for a Client or Location. Locations will inherit Rates set at the Client level and can be customized by Location. *Applies to Clients & Locations.*

Client
Billing Rules



Client Location
Billing Rules

