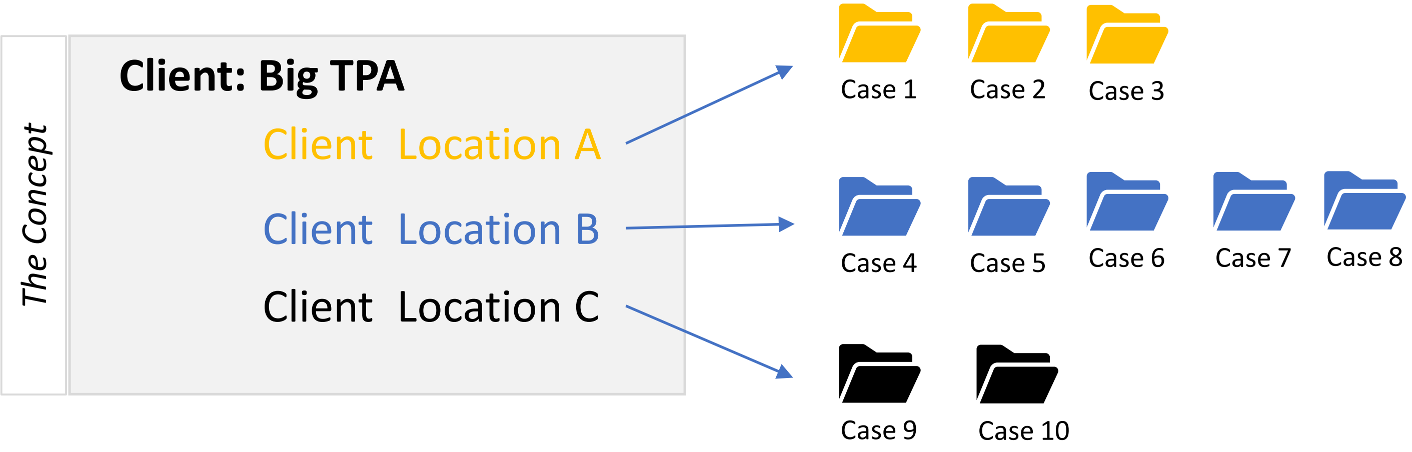
casefriend

# Client Setup Guide

# Client Setup

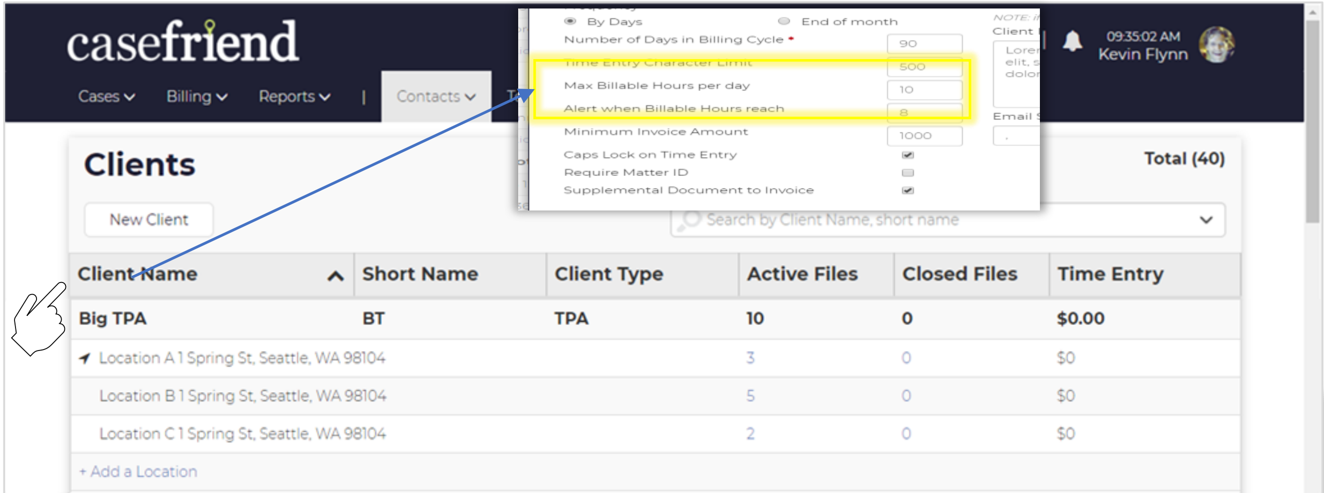
Clients are structured in Casefriend to support the enforcement of common billing guidelines across all Client Locations, and billing rates that differ by client location.




*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 <u>all</u> 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.



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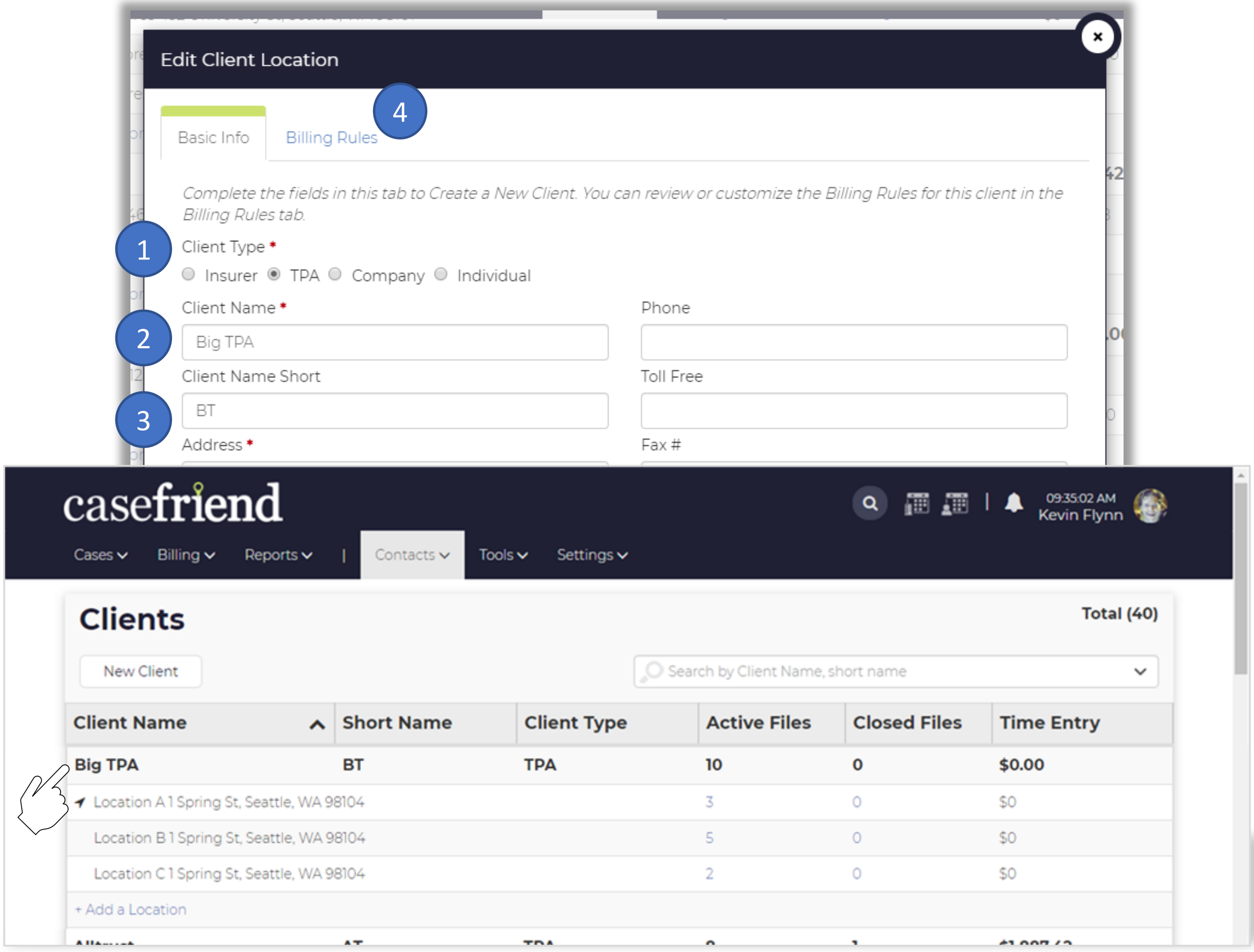
# Client “Groups”

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.

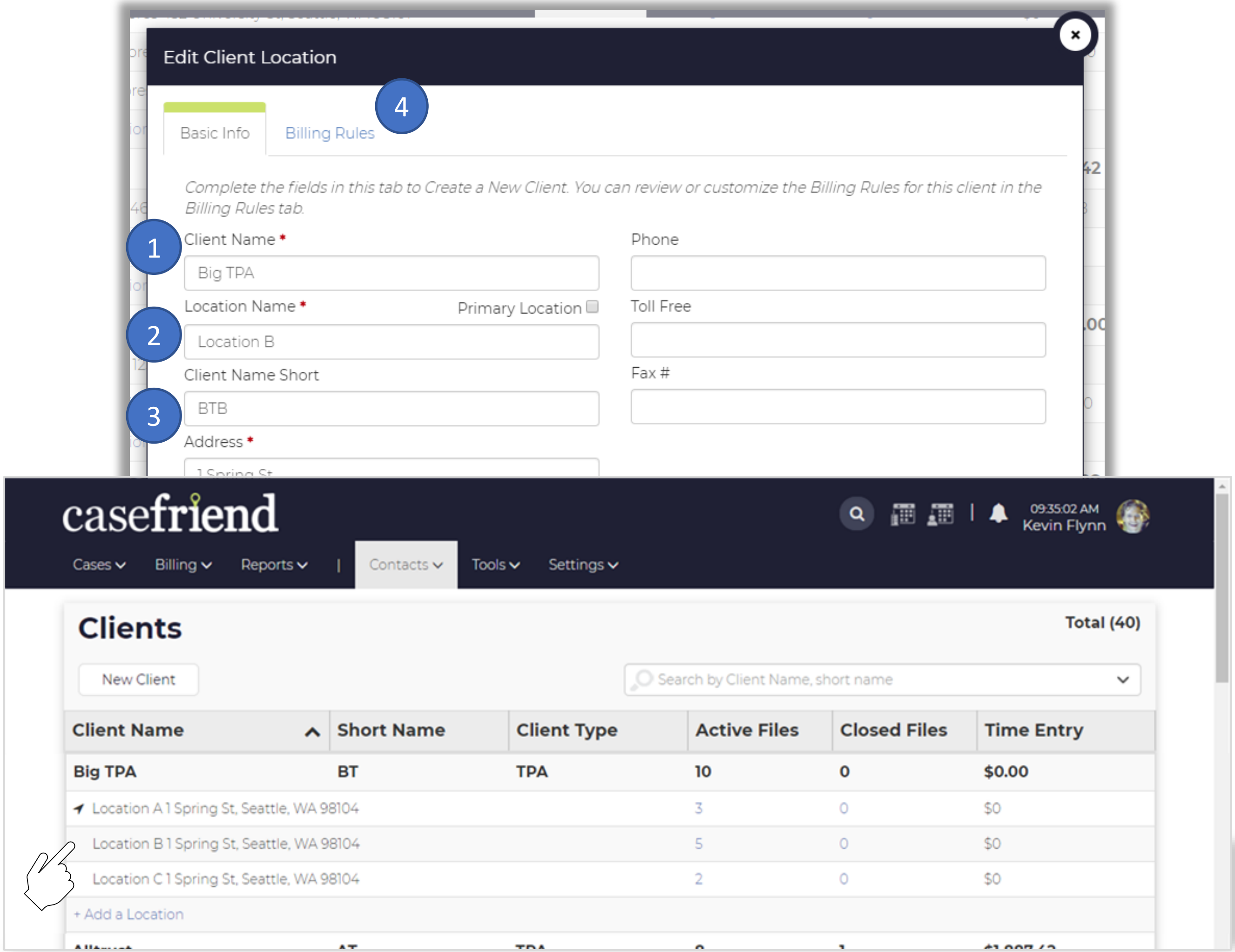
2 Client Name: … is typically, the familiar name your client and all its locations are known by, and is considered the **Client Group.**
*Examples: AmTrust, Zurich*

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*

# Client Location Setup

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

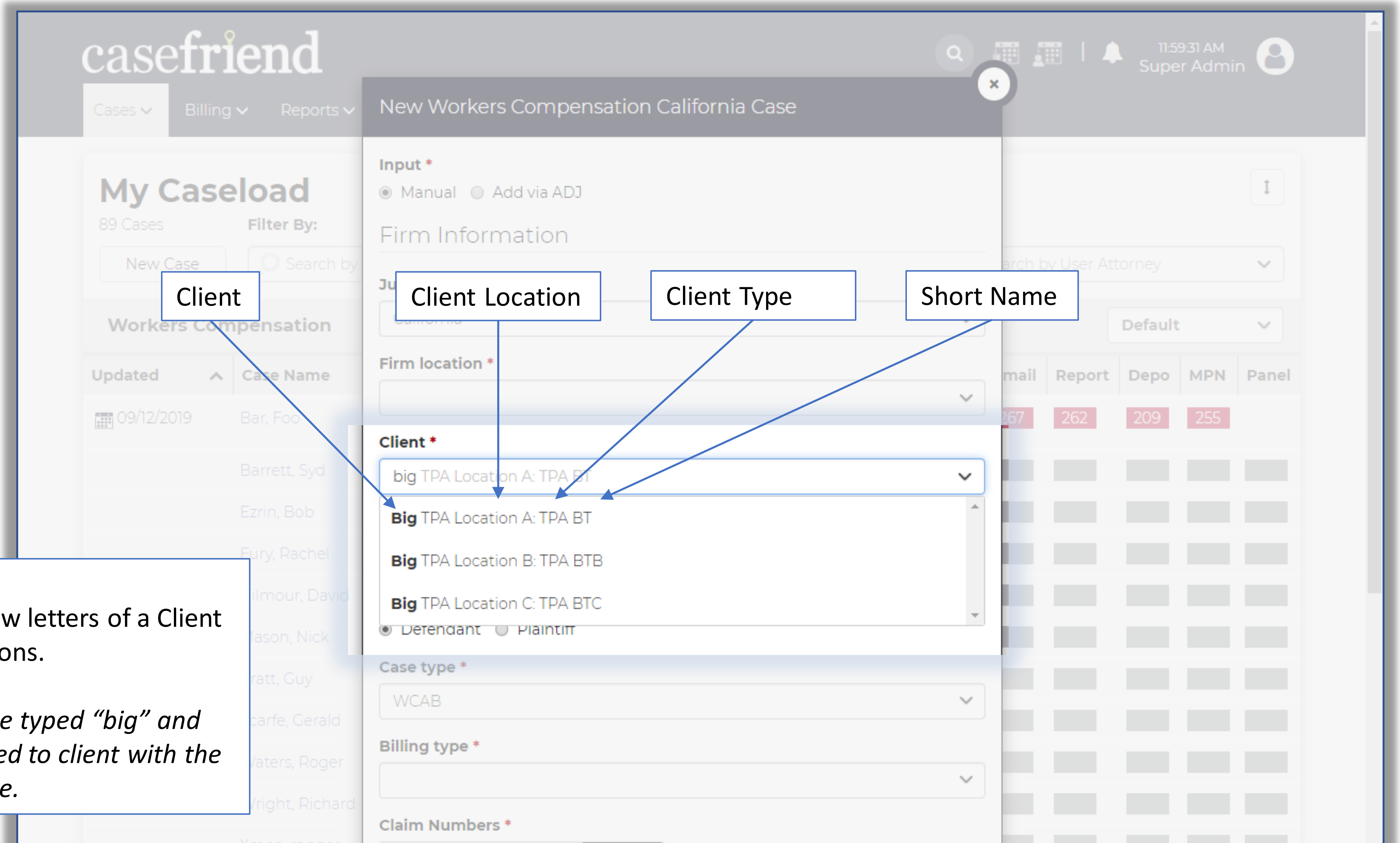
2. Location Name: Cases are assigned to Client Locations. Using the name your new files team, billing team and attorneys most frequently use is recommended. *Examples: AmTrust San Diego, Zurich LA*

3. Client Name Short: This is used for quick reference throughout Casefriend

4. Billing Rules: Location specific Billing Rules can be set here

# Client Locations in Practice: New Case

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



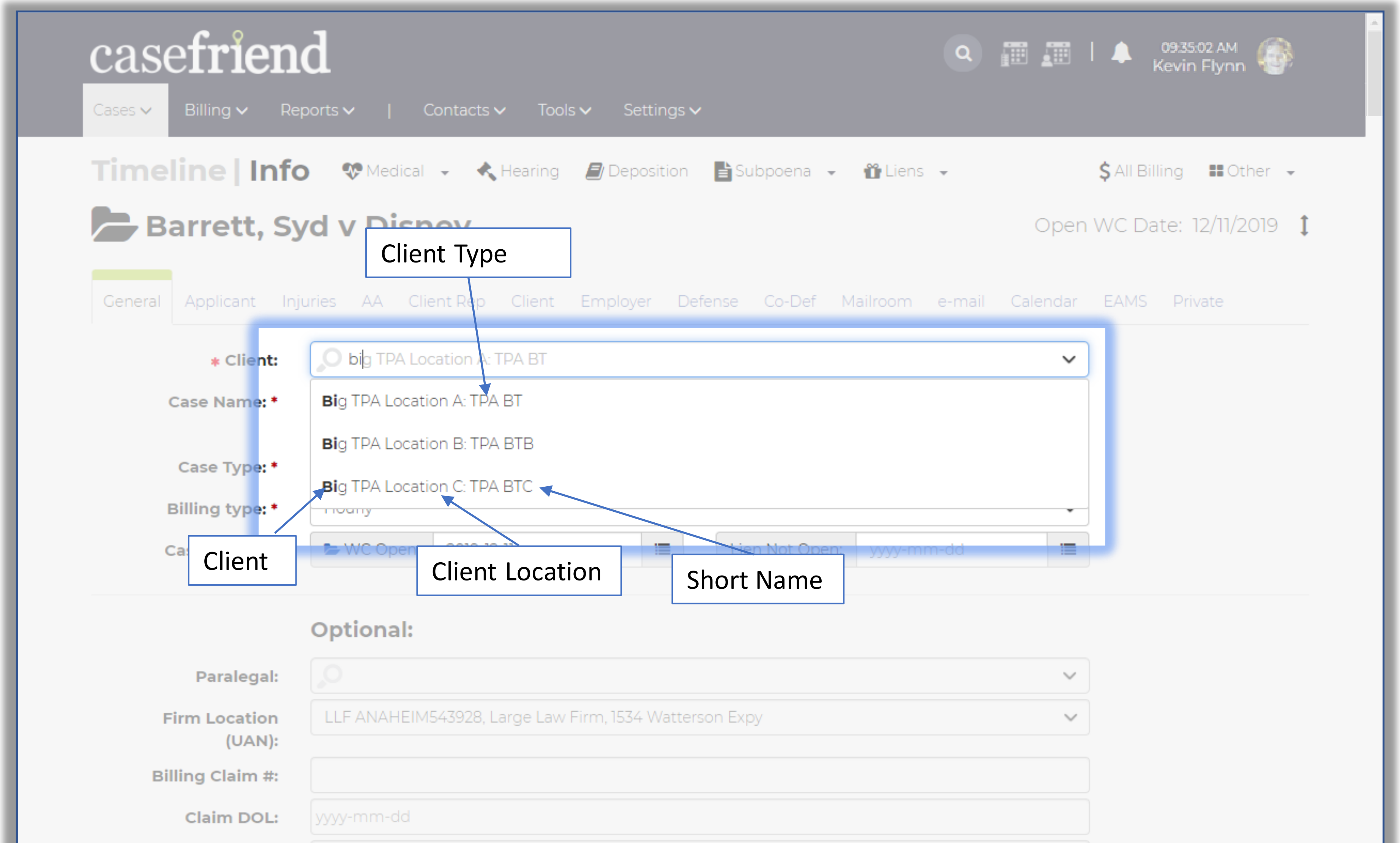

<u>Tip</u>

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.*

# Client Locations in Practice: Changes

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



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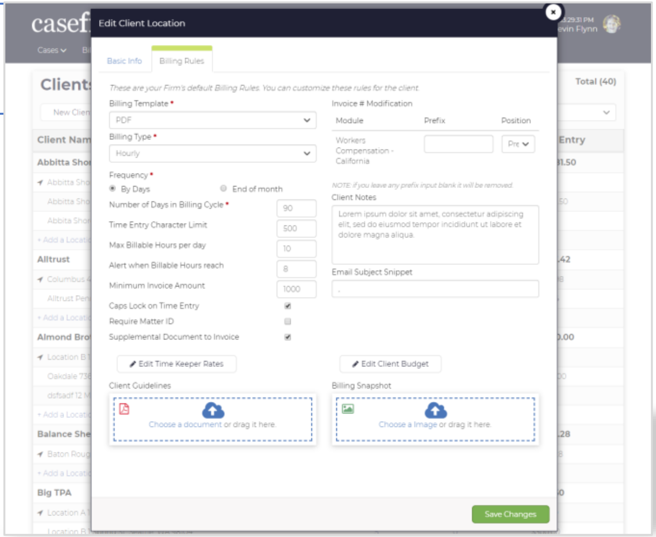
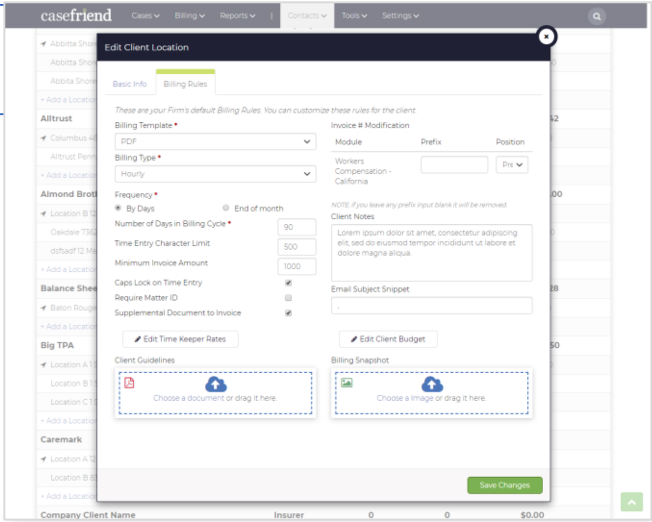
# Client Billing Rules

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

Client Billing Rules




Client Location Billing Rules




## Billing Rules Fields

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

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

<u>Frequency</u>: 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*

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

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

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

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

<u>Minimum Invoice Amount</u>: Set the Client's preferred minimum invoice amount

<u>Edit Time Keeper Rates</u>: 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.*