Collaborati:

TIPS AND TRICKS FOR LAWTRAC CLIENTS

Rate Requests should be submitted with the “Start Date” and “End Date” matching your client’s fiscal year.

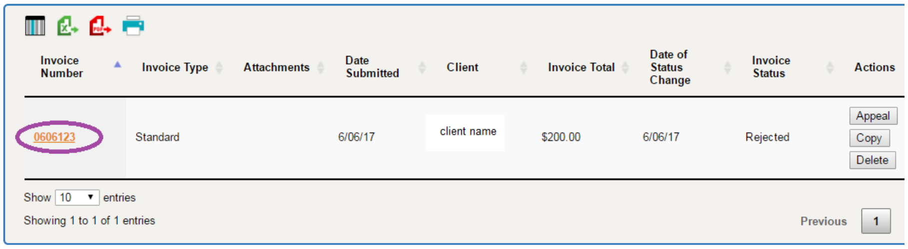
- If submitting a timekeeper’s default rate, use the Type: **Timekeeper Rate**.
- If submitting a timekeeper’s premium rate on a specific matter in addition to the Timekeeper Rate, use the Type: **Timekeeper Rate and then specify a Matter.**

Guidelines for Invoices:
The invoice number must be alphanumeric (containing letters, numbers or both). The invoice number cannot contain any spaces, special characters such as hyphens, ampersands, etc.

Viewing your Invoice Rejection:
If you have signed up for notifications, you may receive an email with information indicating that your invoice has been rejected, similar to this:

To view the invoice in more detail, click on the link which is circled. This will open the invoice in Collaborati so you can review the details.

You can also login to Collaborati and click on the invoice number to review the details.



Invoice Number	Invoice Type	Attachments	Date Submitted	Client	Invoice Total	Date of Status Change	Invoice Status	Actions
0606123	Standard		6/06/17	client name	$200.00	6/06/17	Rejected	Appeal Copy Delete

Common invoice rejection reasons

Q: My invoice was rejected with the following comment: Invoice rejected for 3 Unapproved Rate Codes: L120, L120, L120. What does this mean?

A: The rejection indicates that the line items in the invoice were submitted with unapproved rate codes.

1) *Timekeeper Rates are submitted through the Rate Request feature for your client's fiscal year. These rates will be applied to all approved rate codes.*
2) *The line item dates on the invoice match the FY for which rates have been submitted. If the dates are for a different fiscal year, ensure a rate card exists for that fiscal year.*

Note: If the invoice billing period spans more than one fiscal year, rates must exist for each fiscal year.

Q: My invoice was rejected with the following comment: Expense line items must use timekeeper expense line item(s). What does this mean?

A: *The rejection message indicates a timekeeper needs to be added to the expense lines. It is recommended that a new timekeeper is created with the name, "Expense Timekeeper" (and TK ID "ET". Most firms have an Expense Timekeeper with a high rate ($1000 per hour).*

Q: My invoice was rejected with no comments.

A: *If the invoice is rejected and there are no comments on the invoice, it could be that the invoice has at least two timekeepers and at least one timekeeper has rates, but at least one other timekeeper does not have rates. Please review the timekeepers on the invoice and check if they have approved rates. Submit Timekeeper Rates if there are any timekeepers that do not have rates. Once the rates are approved, you can resubmit your invoice.*

Q: My invoice was rejected for: Client does not accept tax amounts on invoices. What does this mean?

A: *Contact your client to find out if they have a special code to bill your tax on the invoice.*

Q: Does my client accept Summary Level Invoices or Fixed Fee invoices?

A: *Contact your client to find out if they accept invoices with the Line Item type: Total Fees. If not, you will need to submit a detailed invoice with Fee or Expense entries.*