Requesting a New Client Timekeeper Rate

1. Select your client from the Client dropdown menu.



2. Under the Timekeeper tab on the top blue bar, select Manage Client Rates.

| | Timekeepers |
|---|------------------------|
| Γ | Manage Client Rates |
| | Pending/Disputed Rates |

3. Click the New Client Rate button.

| Dashboard | Billing Authorizations | Invoices | Payments | Reports | Timekeepers | s Client Settings | | | | |
|--|------------------------|----------|----------|---------|-------------|-------------------|--|--|--|--|
| Client: Onit Mm New* | | | | | | | | | | |
| Onit Mm New - Account Timekeepers / Active Download Download | | | | | | | | | | |
| | | | | | | | | | | |

4. Fill out the New Client Timekeeper Rate form. You will have to select your timekeeper from the account timekeeper list. Fill out the required fields (*note: the effective date should be prior* to any time that will be billed). If you need **to edit anything in the timekeeper's profile (such as default rate or staff classification) you can use the edit button in the left column.** If your client utilizes custom Staff Classifications, they will be available in the dropdown for selection. Click Send for the timekeeper to be sent to the client for approval.

| Please select a timekeeper from right list to see | Timekeeper * | Select a Timekeeper |
|---|-----------------------------------|---------------------|
| data here. | Add new rate for time | Henry Walls |
| | | Hillary Gates |
| | Client Project | Jessica White |
| | Select a Project | Lucas Rames |
| | Staff Class # | Nick Jones |
| | Mid-Level Associate | 9 X V |
| | Effective Date * | |
| | | |
| | Rate * | |
| | Currency * | |
| | USD | × • |
| | Reason Reason to increase rate | |
| | | |

5. On the client timekeeper list, you will then see the new timekeeper listed with a rate in the Pending Rate column.

| Elm Base Dev - Timekeepers / Active | | | | New Rate | Upload | Download Q Search Timekeepers | | |
|-------------------------------------|---------|-------------------|------------------------|----------|-----------------|-------------------------------|-------------------|-----------------|
| Archive | Delete | | | | Ad | ctive (| 3) Archived (0) | Deleted (0) |
| | TK ID 🔅 | Timekeeper Name 💠 | Staff Classification + | 2 | Approved Rate 🗢 | | Pending Rate 💠 | Actions |
| | 8911 | Nick Jones | Partner | | | | 500.00 usp | Manage Rates |

6. Once the client has approved the rate, the rate will then show in the Approved Rate column and you can bill for that timekeeper at that rate.

| ase Dev | / - Timekeepers / A | Active | New Rate | Upload | Download Q Sea | rch Timekeepers |
|---------|--|---|---|--|--|---|
| Delete | | | | A | ctive (3) Archived | (0) Deleted (0) |
| TK ID 🔅 | Timekeeper Name 💠 | Staff Classification ÷ | 2 | Approved Rate ¢ | Pending Rate | Actions |
| 8911 | Nick Jones | Partner | | 500.00 USD | | Manage Rates |
| 7663 | Jessica White | Of Counsel | | 440.00 USD | | Manage Rates |
| 4194 | Hillary Gates | Associate | | 175.00 USD | | Manage Rates |
| | Delete TK ID \$ 8911 7663 4194 | TK ID \$ Timekeeper Name \$ 8911 Nick Jones 7663 Jessica White 4194 Hillary Gates | Active Delete TK ID \$ Timekeeper Name \$ Staff Classification \$ 8911 Nick Jones 963 Jessica White 7663 Jessica White 4194 Hillary Gates | New Rate New Rate Delete TK ID \$ Timekeeper Name \$ Staff Classification \$ \$ 8911 Nick Jones 9313 Nick Jones 7663 Jessica White 0f Counsel 4194 Hillary Gates | Asse Dev - Timekeepers / Active New Rate Upload Delete Timekeeper Name ◆ Staff Classification ◆ A 7K ID ◆ Timekeeper Name ◆ Staff Classification ◆ Approved Rate ◆ 8911 Nick Jones Partner 500.00 usp 7663 Jessica White Of Counsel 440.00 usp 4194 Hillary Gates Associate 175.00 usp | Asse Dev - Timekeepers / Active New Rate Upload Download Image: Comparison of Com |

Information for Matter Level Timekeeper Rates can be found <u>here</u>.