

CASE COST MANAGEMENT SYSTEM

SYSTEM PROGRAM UPDATED AS OF AUGUST 2016

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Overview of our new system

Gaining Access

To gain access to the system you must first complete a data sheet. There is a link for the data sheet on the login screen. (See page 7)
Once you have completed the data sheet please email it to us and we will issue your firm a username, password and partner signature number.
The partner signature number will only be sent to the partner listed on the data sheet.

Setting up Employees

Once you have logged in to the system, your first step will be to set up any and all employees that you will be submitting time for.
You will need to issue each employee an employee code. Most people use the employees' initials.
All of the employee information can be edited after they have been set up.

Time and Expense submissions

All time and expenses need to be submitted timely.
Please see samples for time and expense submissions.

Unfinished submission

All of your submissions that have not been finalized and submitted appear here.
This is a good way to double check that your submission was successfully uploaded.

Active submissions

All of your submissions that are under review by our firm appear here.
Once the submission has posted you will receive a notification email.

Reports

You have the ability to run critical reports for your firm.
You will be able to clearly see the total amount of accepted hours and expenses for your firm.
We strongly encourage you to use this feature to ensure all of your time and expenses are accounted for.

Instructions for submitting time and expenses on our new system

To submit time:

- Set up all employees on the system (See page 9)
- Click on timesheet form
- Select month and year to submit
- Click on browse to locate your csv file
- Select csv file to be uploaded (MUST HAVE 6 COLUMNS OF INFO)
- Click submit
- Screen with redirect you to incomplete submissions
- Click on the check mark to finalize submissions
- Enter partner signature number
- Click submit time for review

To submit expense:

- Click on expense form
- Select case, month and year to submit
- Key in category amount and correlating page numbers for the expenses
- Enter partner signature number
- Click submit
- Screen with redirect you to confirm expense submission
- Click on select file to locate your backup documentation for expenses
- Click on submit for review

Once your submissions has been reviewed and posted you will receive a notification email. It the responsibility of your firm to keep submissions current.

If you have no time and/or expense for a month please submit a zero submission.

If you are resubmitting a submission, please note that in the note section of the submission.

Case Cost Management System

Instruction for time system

Your time submission must be in csv format. This is a format within excel.

When saving your file, change the file type from worksheet to csv (comma delimited)

Your csv file should have the following 6 columns of data:

- 1 Case Name Case name should be exactly the same as it shows on the time submission screen.
- 2 Date
- 3 Employee Code This is set up by employer when they set up the employee
- 4 Narrative/Description No more than 400 characters or approx 60 words
- 5 Task Code
- 6 Hours

No headings, footers or totals should be on the csv file, only the required data.

A sample csv file should look like the below and must have the correct data in each column

mdl	6/1/2016	abc	No more than 400 characters or approx 60 words	120	2.1
mdl	6/2/2016	abc	No more than 400 characters or approx 60 words	110	4
case A	6/3/2016	abc	No more than 400 characters or approx 60 words	160	6
case B	6/5/2016	abc	No more than 400 characters or approx 60 words	510	4
mdl	6/5/2016	abc	No more than 400 characters or approx 60 words	520	2.5
mdl	6/5/2016	abc	No more than 400 characters or approx 60 words	210	6.5
mdl	6/15/2016	abc	No more than 400 characters or approx 60 words	310	7
mdl	6/20/2016	abc	No more than 400 characters or approx 60 words	420	15
mdl	6/22/2016	abc	No more than 400 characters or approx 60 words	420	12

EXPENSE SUBMISSION

Firm name

Case

Month

SAMPLE

Page	Category	Amount	Allowed	Required Backup Documentation	Guideline for accepting expense
1- 4	Telefax charges	194.00		Must have a contemporaneous log	
5- 11	Postage, shipping and courier	153.39		Must have a contemporaneous log for postage. Must have actual bill for shipping and courier service	
12-14	Printing and photocopying	260.25		Must have a contemporaneous log	
15 - 17	Computerized Research	68.96		Actual bill with charges clearly marked is required	
18 - 19	Telephone -long distance	18.65		Actual bill with charges clearly marked is required	
20	Delta	500.00	500.00	Must have credit card receipt or actual invoice for expense. If a credit card receipt is submitted, there may not be enough information to accept all of the expense.	Guideline: Priceline 2nd highest price or actual fare whichever is lower
21 - 22	The Ritz Carlton - 2 Nights	483.50	483.50	Must have credit card receipt or actual invoice for expense. If a credit card receipt is submitted, there may not be enough information to accept all of the expense.	Guideline: 300.00 per night plus taxes
23	N.O. limo service 2 days	482.00	200.00	Must have credit card receipt or actual invoice for expense. If a credit card receipt is submitted, there may not be enough information to accept all of the expense.	Guideline: 100.00 per trip will be allowed
24- 28	Ruth's Chris - 7 People	682.00	682.00	Must have credit card receipt or actual invoice for expense. If a credit card receipt is submitted, there may not be enough information to accept all of the expense.	Guideline: never more then \$100.00 per person- Must show number of partakers
29	Tips for luggage and bellman	50.00	50.00		Guideline: 50.00 per trip fpr cash expenses
30 - 32	Airfare - private plane or first class -	3,285.00	1,000.00		Guideline: Priceline 2nd highest price or actual fare whichever is lower - Allowed 2 people @ \$500.00 per priceline comparison
33	ABC Expert	10,000.00			Should be submitted to PSC for payment unless requested to be held PTO9IV(1)(g)
Total costs					

An index is required for all expense submissions. The index must include vendor name, page number and amount of expense.

All backup documentation should have page numbers.

Firm Name
Month

Page Number	Amount	Vendor	Description
1	422.16	Boston Harbor Hotel	Travel
2	26.15	Cabfare	Travel
2	30.00	Cabfare	Travel
3	445.31	Springhill Suites - 3 Nights	Travel
4-5	629.70	United	Travel
6	70.08	3rd Bar Restaurant - 2 People	Travel
6	6.57	Freshens	Travel
7	3.20	McDonalds	Travel
7	38.70	Phills Bistro	Travel
8	102.27	Hertz	Travel
8	24.61	Shell	Travel
8	104.75	Cabfare	Travel
8	10.35	The Runway	Travel
9	105.12	FedEx	Postage/Shipping
10	134.38	Westlaw	Comp Research
11	1,619.10	Westlaw	Comp Research
12	4.70	Firm Name	Photocopies
	<u>3,777.15</u>		

Garrett and Company

Case Cost Management System

User name _____

Password _____

Keep me logged in

LOGIN

If you do not have a username and password, please download and complete **the attached data sheet**.

Have the partner sign the signature line and email the completed data sheet to brosa@garrettco.com and we will provide you with a username and password to access this website.

The program has been updated in August 2016. Time input now has 6 columns of data. The first column is "Case Name".

View the Task Codes

Download instructions and sample submissions.

12/8/2016

Chinese Drywall | Garrett & Company

Firm Employee

First Name

First Name

Class

Email

Email Address

Last Name

Last Name

Title

Code

Code

Billing Rates (Per Year)

Year

Rate

Submissions

Firm Reviewer Supervisor
 Case Status Type Category
 Month From Month To Posted From Posted To

Case	Lawfirm	Type	Month	Total Amount	Accepted	Rejected	Status	Date Submitted	Date Posted	Reviewer	Supervisor	Date Info Requested	
View Edit	2047	Sample	Time	2009-8	509,25	509,25	0,0	Posted	06-23-2010	07-12-2010	Bridgett Rosa	Jim Garrett	Withdraw
View Edit	2047	Sample	Time	2010-2	47,00	47,00	0,0	Posted	06-29-2010	06-29-2010	Bridgett Rosa	Jim Garrett	Withdraw
View Edit	2047	Sample	Expense	2010-4	\$783,23	\$783,23	\$0,00	Posted	09-15-2010	10-06-2010	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Time	2009-1	493,00	67,50	425,5	Posted	09-30-2009	10-06-2009	Bridgett Rosa	Debra Garrett	Withdraw
View Edit			Expense	2009-8	\$783,23	\$0,00	\$783,23	Posted	09-30-2009	10-21-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-8	\$576,95	\$576,95	\$0,00	Posted	10-01-2009	10-06-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-8	\$436,75	\$198,00	\$0,00	Posted	10-01-2009	10-06-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-5	\$953,87	\$878,87	\$0,00	Posted	10-02-2009	10-21-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-1	\$1,430,98	\$705,18	\$0,00	Posted	10-02-2009	10-21-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-1	\$175,85	\$175,85	\$0,00	Posted	10-02-2009	10-09-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-7	\$919,89	\$919,89	\$0,00	Posted	10-02-2009	10-09-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-7	\$1,341,91	\$1,341,91	\$0,00	Posted	10-02-2009	10-09-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Time	2009-9	140,00	140,00	0,0	Posted	10-02-2009	10-06-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Time	2009-9	10,75	10,75	0,0	Posted	10-02-2009	10-06-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-9	\$363,09	\$363,09	\$0,00	Posted	10-02-2009	10-09-2009	Bridgett Rosa	Jim Garrett	Withdraw
View Edit			Expense	2009-8	\$886,05	\$886,05	\$0,00	Posted	07-24-2010	07-28-2010	Bridgett Rosa	Jim Garrett	Withdraw

TIME /Sample LAW FIRM LLC / MDL 2047 / AUG 2009
Submission Dates

Submitted	Assigned	Reviewed	Posted
6/23/2010	6/24/2010		7/12/2010

Reviewer: Bridgett Rosa

Supervisor: Jim Garrett

Time Submission Overview

Employee	Class	Case Assessment	Pre Trial	Discovery	Trial	Appeal	Settlement	Total	Rejected	Detail	Judgment
Sam	Attorney	0	0	41.5	0	0	0	41.5			accept
Tom	Attorney	0	0	90.5	0	0	0	90.5			accept
Dick	Attorney	0	0	21.25	0	0	0	21.25			accept
Harry	Attorney	0	0	224.25	0	0	0	224.25			accept
Mary	Attorney	0	0	131.75	0	0	0	131.75			accept
View Daily Time Summary			Submitted Hours:			509.25	Rejected:	0	Approved:	509.25	

Firm Comments

Reviewer Comments

Review Notes

There are no other public notes on this submission yet.

Internal Notes

There are no other internal notes on this submission yet.

Submission Documents

File Name

_0623081521_001_899.pdf (Before 2011 time was submitted by pdf not csv)

Review Finalization

Date Info Requested:

Date Posted: 07-12-2010

EXPENSES / SAMPLE LAW FIRM LLC / MDL 2047 / AUG 2009

Submission Dates

Submitted	Assigned	Posted
9/30/2009	10/1/2009	10/21/2009

Handlers

Reviewer: Bridgett Rosa

Supervisor: Jim Garrett

Client Cost/Expense	Amount	Page	Judgement	Approved Amount
Telefax Charges	\$26.88		reject	
Postage, etc	\$0.00		accept	0
Printing	\$440.75		reject	
Computerized research	\$0.00		accept	0
Telephone	\$315.60		reject	
Travel	\$0.00		accept	0
Sec. Overtime	\$0.00		accept	0
Consulting	\$0.00		accept	0
Depositions/costs	\$0.00		accept	0
Submission Total	\$783.23			
Approved	\$0.00			

Firm Comments

Reviewer Comments

Review Notes

1. Travel expenses entered as Telephone expenses 2. Postage expenses entered as fax charges 3. Need to know why 14 books were purchased and 12 inhouse copies made.

Internal Notes

There are no other internal notes on this submission yet.

Submission Documents

File Name

Sample Drywall time_135.pdf

Date Posted: 10-21-2009