

TIME AND EXPENSE CODES IN CLIO

To best use evovleVoucher, you will want to set time and expense categories you can attribute to your slips. These categories can then be mapped in evolveVoucher to speed your data entry.

| | \odot | Search Law Office of | liesl schreiber | ٩ | Recents - | | ▶ 00:00:00 ③ | 🛛 Create new 👻 🔞 | | | | | |
|---|-----------------|----------------------|--------------------------------------|----------------------|------------------------------|--|-------------------|--------------------|--|--|--|--|--|
| | # | Dashboard | Sack to activities | | | | | | | | | | |
| | ۵ | Calendar | | | | | | | | | | | |
| | ŧ | Tasks | . te entry categories | s Expense categories | | | Filter by keyword | New category | | | | | |
| | ۵ | Matters | Actions | Activity category | Permission groups Co-counsel | | Rate (\$) | Hourly or flat fee | | | | | |
| | 4 | Contacts | | | | | | | | | | | |
| | | Activities | No record match your filters | | | | | | | | | | |
| | Ø | Bills | alls | | | | | | | | | | |
| | E Clio Payments | | | | | | | | | | | | |
| | â | Accounts | No results found 50 results per page | | | | | | | | | | |
| | | Documents | | | | | | | | | | | |
| | e, | Communications | | | | | | | | | | | |
| L | Lui | Reports | | | | | | | | | | | |

Within Clio, select activities

Begin adding your categories, for each CJA time and expense category You can call these categories whatever makes sense to you - they do not have to match the verbiage of the CJA website. For example, I still use the old abbreviations: OCMT (out of court meeting) OCRE (out of court reviewing documents) etc.

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|---------|-------------------------------------|------------------------------------|-------------------|
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| Ċ | | New activity category × | |
| ≔ | Tasks | 24 | r by keyword |
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| 4 | | Expense category | |
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| 盦 | | User default rate - | |
| | | Permission groups | |
| 6 | | Everyone | |
| jaut. | | Visible to co-counsel | |
| Q | | - | |
| ٠ | Settings | Save category Cancel | |
| 0 | Get Started | | |

Once you have your activity and expense categories created, use them on each of your slips:

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|------------|-------------|--------------------------------|------------|----------------------|----------|--------------|-----------|-------------|
| 41 | Dashboard | Activities | | | Mana | | | New expense |
| Ċ | | Edit time entry | | | | × | | |
| = | | - | | | | | Columns - | Filters - |
| • | | Duration 🕜 | | Matter | | | | Bate (\$) |
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| Ø | | Activity category | | Date | | Required | | 0.00 |
| | | Find a category | • | 03/05/2020 | | Ē. | | |
| | | HOURLY | | Firm user | | Required | | |
| Ē | | OCOT | | liesl schreiber | | • | | |
| - M. | | | | Rate 😯 | Required | | | |
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| c | | | 4 | | | | | |
| 0 | Settings | Save entry Save and create and | other Save | and duplicate Cancel | Delete | | | |
| 0 | Get Started | | | , , , | , | | | |
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| LS | | | | | | | | |
| R | Collapse | | | | | | | O Hala |

See the export instructions on getting your slips out of Clio and in to evovle. Once your slips are in evolveVoucher, it's easy to map the codes you are using to the ones evoucher needs. Before mapping, they'll be red, but as you click on them and tell evoucher which CJA code your codes correlate to, it will automatically begin applying the mapping to all of your slips.

When you're all green, you're good to go. evolveVoucher will remember your mapping for your future bills.

| Import CJA 20 Slips × | | | | | | | | | | | | |
|-----------------------|----------------------------------|--------------------|---------------------------|------------------|---------------------|------------------|------------|--------------------|------------------|-----------|----------------------|-----------------|
| 🥑 Billings Pi | ro | | | | | - | Back to So | urces Add | 81 Slips to Bill | +] | | |
| Service (71 slips | ~ \$7,163.20) Expense (10 | slips ~ \$31.00) | Skipped | | | | | | | | | |
| ↓ You can selec | t mulitple slips to perform bulk | actions! | | <i>∀</i> Filt | er Slips: Sou | rce Category | . De | scription | Clear Fil | lters | | |
| Date | CJA Code (Source Category ≒ C. | IA Code) | L | nits | Rate | Total | De | scription | | | | |
| 02/14/2019 | OCRS - Legal Research 🛛 🖨 🗛 | ssign CJA Code 🖉 | 0 | .9 | \$148.00 (?) | \$133.20 | col | ntinue legal anal. | 🖻 🖉 | Ū | | |
| 02/14/2019 | OCRS - Legal Research 🛛 🖕 🚺 | ssign CJA Code 🖉 | 0 | .2 | \$148.00 ⑦ | \$29.60 | dra | aft & file MTC/De. | . 02 | 0 | | |
| 02/19/2019 | OCTR - Travel Time 🗧 🗛 | T la Codo # | 1 | 7 | \$1.40 00 M | \$351.60 | tes | uni to carnool tr | | A | | |
| 02/19/2019 | OCMT - Meetings 🚔 🗛 | Import CJA | 20 Slips | | | | | | | | | |
| 02/19/2019 | OCTR - Travel Time 🛛 🖨 🚺 Assig | 🖉 🥑 Billings Pr | 0 | | | | | | I | Back to : | Sources Add 81 S | Slips to Bill → |
| 02/19/2019 | OCOT - Investigation/Other | Sandes /71 alian | (7.162.20) Emer | no (18 cline - | (21.00) E | danad | | | | | | |
| 02/19/2019 | OCRE - Reviewing Records | Service (71 sups - | \$1,163.20) Exper | ise (to slips ~ | \$31.00) 5 | | | | | | | |
| 02/19/2019 | OCOT - Investigation/Other | ↓ You can select | mulitple slips to perform | 1 bulk actions | | | V | Filter Slips: Sou | irce Category | | Description | Clear Filter |
| 02/20/2019 | OCOT - Investigation/Other | Date | CJA Code (Source Catego | ry ≒ CJA Code) | | | Units | Rate | Total | 1 | Description | |
| 02/20/2019 | OCOT - Investigation/Other | 02/14/2019 | OCRS - Legal Research | ⇔ Services® | esearchWritingHou | 32 | 0.9 | \$148.00 | \$133.20 | | continue legal anal | ⊡ ∠ 1 |
| 02/26/2019 | OCOT - Investigation/Other | 02/14/2019 | OCRS - Legal Research | ServicesR | esearchWritingHou | s <u>e</u> | 0.2 | \$148.00 | \$29.60 | | draft & file MTC/De | ⊡ ∠ (|
| | | 02/19/2019 | OCTR - Travel Time 🗎 🖨 | ServicesTrave | :lHaurs <u>@</u> | | 1.7 | \$148.00 🗇 | \$251.60 | 1 | ravel to carpool tr | ⊠ ∠ f |
| | | 02/19/2019 | OCMT - Meetings 🖨 | ServicesIntervie | ewHours 2 | | 2.6 | \$148.00 🕐 | \$384.80 | | Meeting with client | 8 🖉 t |
| | | 02/19/2019 | OCTR - Travel Time | ServicesTrave | alHours 🖉 | | 0.5 | \$148.00 | \$74.00 | | return travel from c | 020 |
| | | 02/19/2019 | OCOT - Investigation/Oth | er 🗧 Servi | cesInvestigativeOtH | erHours <u>@</u> | 0.2 | \$148.00 😨 | \$29.60 | 1 | Email to AUSA re: p | ◙ ∠ (|
| | | 02/19/2019 | OCRE - Reviewing Record | s 🗦 Servic | esRecordHours∠ | | 1.5 | \$148.00 🕐 | \$222.00 | | re-review client me | 5 L f |