

Merrill Legal Solutions/LegaLink, Inc. Billing – Production Form

Court Reporter's Tips & Instructions

Introduction

This document is intended as a guideline in working with the new Billing and Processing Form. This form's goal is to minimize errors in our workflow, while reducing the burden in filling it out and submitting it, utilizing or storing it.

The form is highly automated, consisting mainly of three types of fields: DROP-DOWN, CHECK-BOXES, CLICK and TYPE fields and FORMULAS (hidden)

You will find that most of the information has already been typed-in for you, all that is remaining for you to do is to click and select the right box or option.

NOTE: The form includes restrictions on mandatory fields – **you will not be able to close, save or print the form unless you enter the information requested in those fields** (Example: Job number, Day Taken, etc.)

It is highly important to select all the boxes that apply to the respective job. By doing so, everyone benefits: the client get what they ordered, you get paid what you are due and processing and billing is complete and accurate. Please remember to clear any information remaining from a previous job.

This new form includes information to be filled-in by court reporters, the production department and the billing department.

Opening the form

In order to be able to open the form you have to have either Omniform Reader installed or Internet Explorer available (latest version) or be able to receive a self-executable *.exe file by email (check security protocols in your email software). Normally you should be able to open at least the *.html file format without any additional software on your computer. Due to security concerns imbedded within Internet Explorer, the program may only show lines of code when you try to open the file. If this happens, please check Internet Explorer's toolbar, there should be a yellow line with a message right under the toolbar. Clicking on this line will bring up the prompt to "Allow blocked content" – Click on "Allow" – then on the following pop-up screen click on "YES", and then hit "OK" on the last screen. On your first try you may also be prompted to "Install Software" – click "YES" (or OK). This is normal and will not harm your computer. Should you require more assistance please do not hesitate to contact your local LegaLink/Merrill office.

Working with the form

Orders from the taking attorney are on the first page, while all copy orders are on the second page. If the job has no copy sales, or if it is just a cancellation, Statement on the Record, etc. only the first page is all that needs to be completed and submitted– there is no need to send in the second page.

If the copy sales exceed 3 orders, you can use the additional pages provided and send in the additional copy orders. (You can locate additional pages by clicking in the LOWER-RIGHT corner of the form, on the small icons numbered "1", "2", "3", "4").

JOB NUMBER [mandatory field] moved at the top right corner. Job number must be typed in on all pages, should a page become loose.

Criss-Cross Job Number added on the first page on the top right corner under the main job's number.

DAY TAKEN [mandatory field] – Please select the day deposition was taken. This helps us process correctly jobs taken during week-ends.

JOB TYPE [three mandatory fields] – All applicable job types were grouped under 3 distinct boxes to better distinguish between jobs, since this determines how the respective job will be handled in both production and billing. Please select applicable fields for all three job type boxes. These boxes were designed in such way that only one selection per box is needed.

There are 5(FIVE) rows for deponents' names. This should suffice for most depositions. For depositions needing more than 5 rows, please use a SEPARATE form. DO NOT write in the additional names in different fields, since that will only lead to confusion and mistakes.

Please enter the time each deposition started and ended, even if the pages are not ordered written-up at the end, since this information is critical for correct billing. Please then enter the page you started and ended each deposition. DO NOT worry about writing in the total page count to the right. The form will automatically calculate for you the page totals in those columns.

Please ensure that you indicate the number of lines per page, as we need this info for payroll purposes.

Under "EXHIBITS" column, if exhibits are RETAINED, just select "YES", leaving the column immediately to the right BLANK, or select "NO" if exhibits are attached and then write the page count under the column immediately to the right.

For special circumstances we provided special fields like “Special Production Instructions”, or “Special Billing Instructions” for you to manually type in the instructions for either production or billing.

Do not type in any information under “Billing use only” box.

If Claim/Insurance information has been provided to you on assignment, type that in the specially designated box.

If you are sending exhibits via UPS, FEDEX, DHL, etc., enter the tracking number in the box provided. Do not worry about other boxes in the production-related fields, as it only pertains to the production department.

Orders blocks: Under “Order” blocks, you will find much more detail for items ordered. Items like Exhibits, Rough ASCII’s, Realtime, Expedited Order, can now be detailed by witness, should one be ordered differently from another. It is very important to select the type of Realtime used, as well as its version. Please use the “Special Billing Instructions” field to write any specifics that may apply to the respective order. As you may be able to observe, this field has been provided on each order (or invoice) so do not to write everything under just one box, but refer to that order only. Except for the “Attendance” column, all these order blocks are identical. “Attendance” field has been provided for those instances where court reporters are being paid hourly as opposed to per page.

Send Invoice/Send Transcript Box: Its purpose is to differentiate between attorneys who are to receive the product from the attorneys who must be invoiced for the respective product. Most times it will be just one and the same, while the most differences will be found on third-party billing (Insurance carriers), Arbitrations and split billing work.

Commission box: We provided two fields, one for your per page rate, another (to the right) for the total amount per job. This box can be found on each order.

Saving and sending the form into the office

When you are done entering the information, please select “File”, then “Save As” and type in the JOB NUMBER as the name you want to save the file under. As destination, use the folder on your computer that you are most comfortable with, and save it.

Once the file it’s saved, you can either email it as an attachment into the office, or upload it with your job to RB-WEB. The idea is for you to continue using whatever method you were using before, while discontinuing printing the form and faxing it in. This should save you time, paper and toner.

GLOSSARY OF TERMS:

Scheduling Office

Please type in the name of the office who got the call from the client. This is the office that has a direct contact with the client and will ultimately do the production and billing of client.

Performing Office

Please type in the name of the office assigning the job to you. This is the office that was hired by the scheduling office to actually take the job and turn in the transcript for production.

NOTE: For most LOCAL work, both Scheduling and Performing Offices should be the same name. Office names should only be different for work assigned from out of town firms, or for work assigned to out of town court reporting firms or other Merrill offices.

Criss-Cross Job Numbers

Each counsel is taking one or more depositions. Same Court reporter is taking all depositions, but one scheduled by client, the other one taken by the opposing counsel.

No-Write-up

Transcript not ordered on-site after proceedings taken down by Court reporter

Late Write-up

Previously not written-up transcript ordered written up by either party at a later time.