

Time Record Entry with Time Matters

Wells H. Anderson, J.D., CIC

Active Practice LLC

5200 Willson Road, #150

Minneapolis, MN 55424

Helping lawyers leverage technology

Phone 800-575-0007

E-mail info@activepractice.com

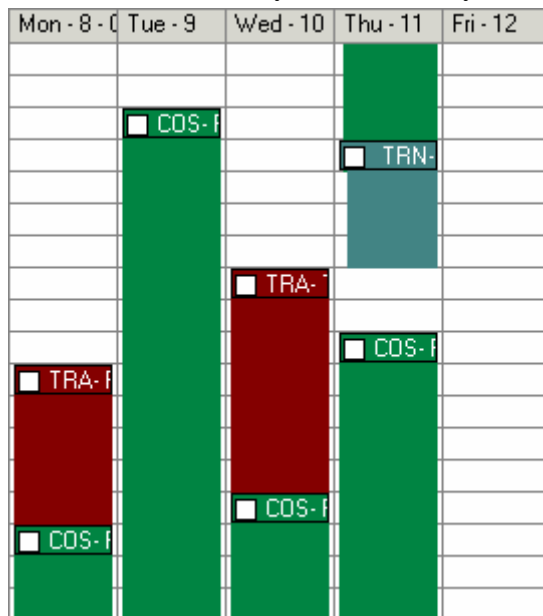
Eeb <http://www.activepractice.com>

Introduction

Are you interested in tracking billable hours more effectively? Enter time records on the Time Matters Calendar. Then bill them using PCLaw, Billing Matters or one of the other leading time and billing programs. This white paper explains the benefits of this approach, tells you how to enter time records, and gets you started with illustrations and short-cuts.

Entering time records on the Time Matters Calendar delivers a number of benefits:

- **Avoid retyping** - Events already on your Calendar can be billed with little or no added typing.
- **Simplify** - Timekeepers use one program, Time Matters, both for working with client information and for tracking time.
- **Capture more billable time** - The Calendar graphically shows gaps that may need to be billed, so you are visually reminded to capture time you might miss.



Calendar shows unbilled gaps

Time Record Entry in Time Matters

Note: To customize your calendar to match the screen shot above, right-click on your Calendar and click Display Options. On the Multi-Day tab choose: Duration Bar = Solid, Header Color = Code. Also click on Display Fields and move Code to the top. Click OK. Pick the 7 Days view and Staff = your initials. Colors for the Codes are set in File > Features Setup > Classification Codes.

For simple invoicing, Time Matters includes some basic timekeeping features, an invoice form and a few invoice formatting options. But most offices that need to generate invoices or statements will benefit from using Time Matters with PCLaw, Billing Matters or with another time and billing program.

Summary of Time Record Entry Steps

Step	Instructions
1. Select the Start Time	Double-click on the Calendar
2. Fill in the Duration	For example, type: 1.25
3. Type or Pick a Code	Use the drop-down button to pick from the Code list
4. Complete the Description	Type it or use an AutoEntry form
5. Select a Matter	Tab to the Matter field, click the Lookup button
6. Save and Close	Click on the Save & Close button

Steps for Time Record Entry

>> Select the Start Time

Double-click on the Calendar in the block for the Start Time of your time record.

Events	Mon, Oct 21
8:00a	
:30a	
9:00a	
:30a	
10:00a	
:30a	
11:00a	
:30a	

The Event form appears with the date and time already filled in.

Save & Close Save Cancel

Primary Custom Related Notes Documents Phone Email Mail Lexis Billing Outline

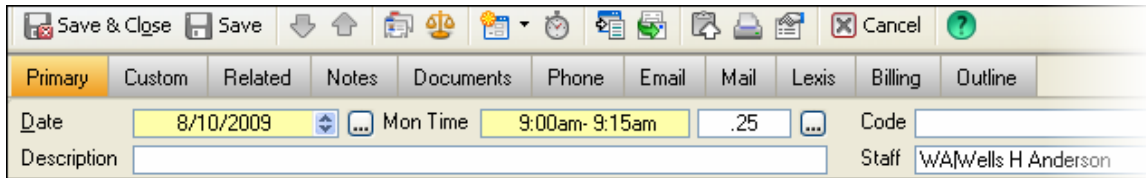
Date 8/10/2009 Mon Time 9:00am 0.00 Code

Description Staff WA|Wells H Anderson


Time Record Entry in Time Matters

>> Fill in the Duration

Press Tab twice and type in the Duration in hours, using a decimal point.

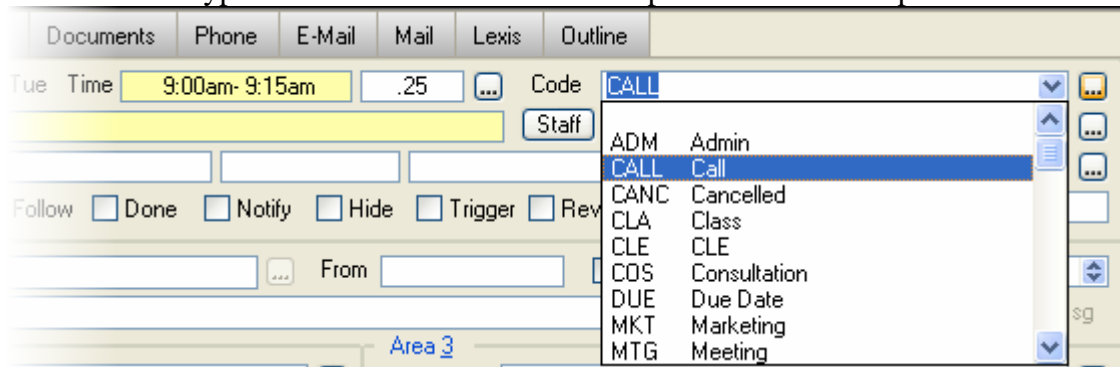


The screenshot shows the top portion of the Time Matters software interface. The menu bar includes 'Save & Close', 'Save', 'Cancel', and a help icon. Below the menu bar are tabs for 'Primary', 'Custom', 'Related', 'Notes', 'Documents', 'Phone', 'Email', 'Mail', 'Lexis', 'Billing', and 'Outline'. The 'Primary' tab is active. The 'Date' field is set to '8/10/2009'. The 'Mon Time' field is set to '9:00am- 9:15am'. The duration field is set to '.25'. The 'Code' field is empty. The 'Description' field is empty. The 'Staff' field is set to 'WA|Wells H Anderson'.

Note: Another way is to type the Start and Stop times or click the arrow button  and click on the hour, minute and am/pm buttons.

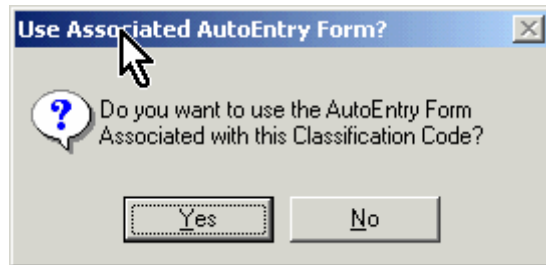
>> Type or Pick a Code

Press Tab and type in the Code or click on the drop-down button and pick it.



The screenshot shows the 'Code' field in the Time Matters software interface. The 'Code' field is set to 'CALL'. A dropdown menu is open, showing a list of codes and their descriptions: 'ADM Admin', 'CALL Call', 'CANC Cancelled', 'CLA Class', 'CLE CLE', 'COS Consultation', 'DUE Due Date', 'MKT Marketing', and 'MTG Meeting'. The 'CALL Call' option is selected. The 'Staff' field is set to 'WA|Wells H Anderson'.

AutoEntry forms save time. If your code has one, click Yes in the window that pops up:

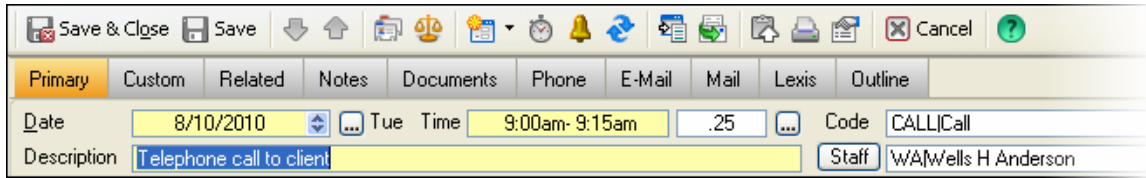


AutoEntry forms are included in Feature Packages that you can purchase from a Time Matters consultant or you can create your own. They will enter Descriptions automatically.

Time Record Entry in Time Matters

>> Fill in the Description

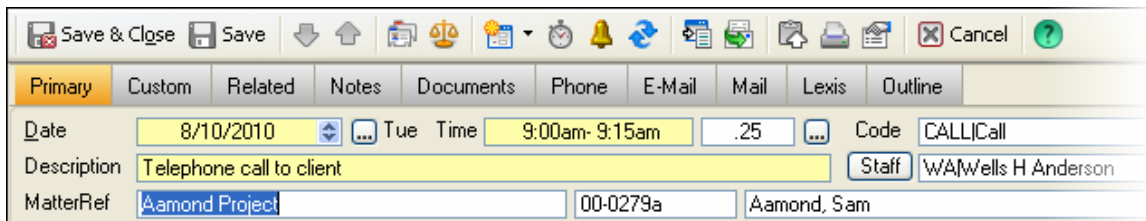
Complete the Description with any additional text.



The screenshot shows the Time Matters software interface. The 'Description' field is highlighted in yellow and contains the text 'Telephone call to client'. Other fields include 'Date' (8/10/2010), 'Time' (9:00am-9:15am), 'Code' (CALLICall), and 'Staff' (WAWells H Anderson).


>> Select a Matter

Press the Tab key to skip past the Staff field and go to the Matter (or Case) field in the Regarding row.



The screenshot shows the Time Matters software interface. The 'MatterRef' field is highlighted in yellow and contains the text 'Amond Project'. Other fields include 'Date' (8/10/2010), 'Time' (9:00am-9:15am), 'Code' (CALLICall), and 'Staff' (WAWells H Anderson).

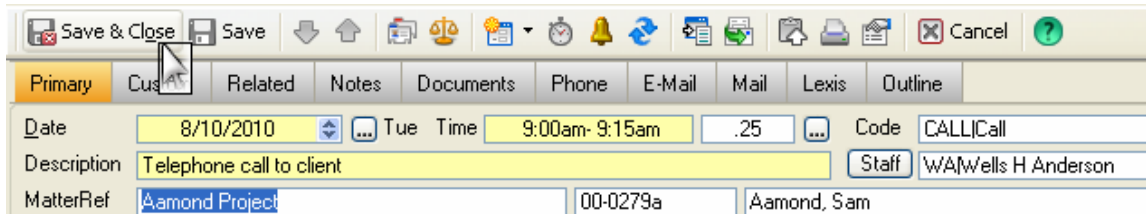
Notice that the label on the left changes from Regarding to MatterRef (or Case Ref).

Start typing the Matter name or click on the Lookup button  to the right. Select the Matter (or Case) in the window that appears by starting to type its name.

Double-click on the Matter.

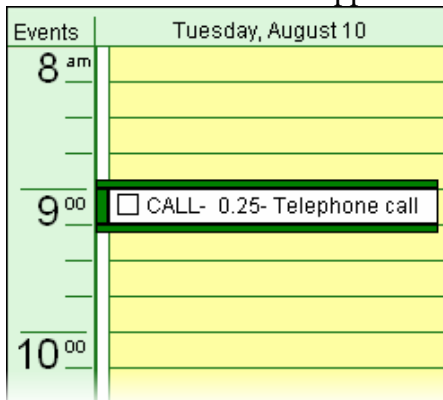
>> Save and Close

Now that the Time Record is complete, press the Save & Close button.



The screenshot shows the Time Matters software interface. The 'Save & Close' button is highlighted in yellow. Other fields include 'Date' (8/10/2010), 'Time' (9:00am-9:15am), 'Code' (CALLICall), and 'Staff' (WAWells H Anderson).

Your Time Record now appears on the Calendar.



Events	Tuesday, August 10
8 am	
9 ⁰⁰	<input type="checkbox"/> CALL- 0.25- Telephone call
10 ⁰⁰	

Additional Details on Entering Time Records

>> Narrative Billing

Some clients and courts require very detailed time records. If you need to provide long descriptions of your work, use the Memo field. If you are using PCLaw, Billing Matters, or another linked billing program, you need to change a setting so that text in the Memo field can be transferred to your invoices. Go to File > Program Setup > Program Level > Links > Billing > Rates & Aging. For "Inherit Billing Description from," select: Memo field.

You will save time if you enter narrative billing descriptions as you work. One approach is to create a new time record, describe the work you are starting in the Memo and then add to that description as you work. You can minimize the record, parking it in the lower left corner of Time Matters. Return to it periodically to add more description to the Memo.

>> Separating Billable from Non-Billable Events

All these records entered in Time Matters show up as Events on the calendar, along with other Events you may add that are not related to client matters. Billable and non-billable Events need to be identified separately so that only the billable events are invoiced. Check the Billable checkbox to mark each billable record so that it can be included in your invoices.

Many firms use one group of Classification Codes for billable events and another group of codes for non-billable events. Colors can be assigned for billable and non-billable services. Greens are often used for billable services. It is best to create an AutoEntry Form for each billable Classification Code and set it to check the Billable checkbox.

>> Using the Done Field

You can use the Done field to mark records as ready for billing. Though this involves an additional step before time records are ready for processing, it is easy to do. Just right-click on a record on the Calendar. You have the option to mark it Done without having to open it. Some billable Events are placed on the calendar in advance. The Done field helps distinguish between Events that were merely scheduled and those that actually occurred. Checking the Event as Done also signifies that the narrative has been completed and any adjustment has been made to the duration.

>> Keyboard Shortcuts

Time Field – Instead of doing mental math, sometimes it is easier to enter a Start Time and a Stop Time. Let Time Matters calculate the Duration. You can enter numbers into the Time field using a variety of shortcuts. For example:

What you type	Result in Time	Result in Duration
11-1	11:00am- 1:00pm	2
930-1045	9:30am-10:45am	1.25
5-720p	5:00pm- 7:20pm	2.33 Note: You need to use the "p" for pm. Otherwise, the default for 7:00 is am.

Time Record Entry in Time Matters


Code Field – With the cursor in the Code field, the Down-Arrow key will cause the drop-down list of Codes to appear. You can press the Down-Arrow key repeatedly to select a Code. Press Tab to leave the field.

Staff Field - The Staff Field can fill in automatically with the initials of the Default Staff person. The Default Staff person's initials appear in square brackets [WA] in the lower right corner of Time Matters. This person is linked to the user in File > Security Setup.

To customize the Staff field so that it will fill in automatically, right-click on it and click Customize Field. Click the check box for Enter Staff on ADD.

Regarding Fields – With the cursor in a Regarding field, use the F2 key to pop up a Lookup window instead of clicking the Lookup button. For example, to select a Matter using the Matter Number, type it into the last field or click in the last field and press F2.

>> Using the Timer

The Timer is available to track the actual time you have spent on working on a particular task. You can start the Timer by clicking the Stopwatch icon.  How the Time behaves when you open or minimize a record can be changed. Go to: File > Program Setup > User Level > Forms Select: Event and click on: Set Form Options > Timer

>> Billing from Other Kinds of Records

Records other than Events also have Timer icons and can be used to create billing records. This subject merits its own white paper since it involves making a significant change in how you work with Time Matters.

Sending Time Records to Billing

The procedures for sending time records to billing vary depending on which billing program you are using. In general, the billable Event records (your time records) are marked in the Event list using a filter to select the billable records. Then Billing Records are created from these records. The Billing Records are transferred to a linked time and billing program or placed on invoices within Time Matters.

Conclusion

When you bill your time within Time Matters, you are spared the hassle of dealing with the quirks and differing screens of another program. When Events such as meetings, teleconferences and appearances have been scheduled in advance, you are spared from having to re-enter their basic information.

Entering new time records in Time Matters can become a routine, 6-step process quickly repeated throughout the day:

Start time > Duration > Code > Description > Matter > Save & Close

Unlike a paper timesheet, Time Matters never gets buried on your desk. You can see a colorful view of billable time and non-billable time over the course of a day, week, or 4-week period. Billing on your calendar helps you capture all your work.

Time Record Entry in Time Matters

Though keeping time may be an unwelcome aspect of law practice, at least Time Matters can streamline the process and even produce more revenue.

Questions? Comments? Please write or call:

Wells H. Anderson, J.D., CIC

Active Practice LLC

info@activepractice.com

800-575-0007