

Data Clearing House Billing Formats

(For LexisNexis® PCLaw™ Electronic Billing versions 7 and 8)

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About the Data Clearing House Billing Formats

Electronic Billing in versions 7 and 8 utilizes the Custom Tabs feature to manage the different electronic billing formats. Electronic Billing tabs can be implemented on a matter by matter basis, or added by default to all new matters or all new matters within a specific type of law.

This document covers the special requirements for preparing PCLaw, entering time and expenses, and billing using the Data Clearing House format. Use DCH7 billing template for version 7 and 8

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Installing the Template and Custom Tab

If the DCH7.rbf template or DCH.ctl tab layout are not currently included in your list of PCLaw templates and custom tabs, the files need to be saved into the Statdata directory. The following instructions are for Microsoft Outlook. The procedure for other browsers may differ.

1. *If you have received the files as an attachment in an e-mail:* On the e-mail window, select **File > Save Attachments**.
A Save All Attachments window appears.
2. Select **DCH7.rbf** and **DCH.ctl**.
3. Click **OK**.
A Save All Attachments window appears.
4. Browse to your **Statdata** directory.
5. Click **Save**.
The files are now saved in your Statdata directory and should appear in PCLaw.



The location of the Statdata directory appears on the Select Set of Books window when opening PCLaw. Refer to the Path column adjacent to your set of books. Statdata is a sub-directory of the data directory that appears under the path column for that set of books.

Completing Custom Tab Information

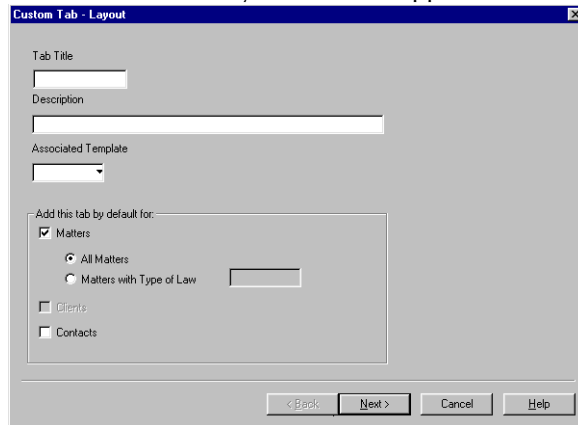
Pull down menu:

Options > Custom Tabs

PCLaw provides a pre-designed custom tab for the Data Clearing House format. The custom tab can be added automatically to all matters, or only to matters belonging to an assigned type of law. Changes to tab fields are not recommended as the fields are configured to meet the specified requirements of the company or industry.

1. On the Custom Tabs window, highlight **DCH**.
2. Click **Change**.

The Custom Tab - Layout window appears:



3. In the **Associated Template** box, select **DCH7**.



When an associated template is assigned, PCLaw creates two copies of an invoice. The first uses the template specified on the Billing tab of Matter Manager for the screen or printer output. A second invoice generates using the associated template specified on the electronic billing tab for the editor or e-mail output.

4. To include this tab as a default tab in Matter Manager for matters created from this point forward, select **Add This Tab By Default for:**

To include this tab for all matters, select **All Matters**.

To include this tab for matters assigned a specific type of law, select **Matters with Area of Law**.

Type or select the type of law in the **Area of Law** box.



For version 7.50 and 8: Fields marked as required are included on the Custom tab in the New Matter window. Remaining fields can be completed in Matter Manager.

5. Click **Next**.
The Custom Tab - Tab Fields window appears.
6. Click **OK**.
The added information is saved.

Preparing Matters

This procedure describes adding the Data Clearing House custom tab to an individual matter using Matter Manager.

1. In the **Matter** box, type or select the matter nickname that is to use the Data Clearing House format.
2. Click the **Add Tabs...** tab.
The Add Tabs window appears.

3. Highlight **DCH**.
4. Click **Add**.
The DCH tab is added to the matter.
5. Click the tab.
The Data Clearing House tab displays as follows:

6. Complete all fields on the DCH tab as required.
7. *For version 7.50 and 8* Click **Save and Close**.
For version 7.22 and lower: Click **Close**.
The tab information is added to the matter.

Adding Expenses

When entering expense entries in the General Check, Expense Recovery, or Accounts Payable features, select the explanation code best describing the entry. Explanation codes may start with a specific letter, for example, E. Consult your electronic billing documentation for the proper list of explanation codes to use.

Click the **m** button to the right of the Amount box. and fill in the Quantity x Rate window for each expense entry.



If the **m** button is not available, Quantity x Rate must be activated on the Options > System Settings > Data Entry tab. Quantity x Rate can also be set as a default setting for individual explanation codes.

Adding Time

When entering time entries on the Time Sheet, select the task and explanation codes best describing the entry. Task Codes may start with a specific letter, for example, L. Explanation codes may start with a specific letter, for example, A. Consult your electronic billing documentation for the proper list of task and explanation codes to use.

Creating Invoices

When creating invoices, select one of Editor or E-mail for the output, as well as one of Screen or Printer. The invoice is saved as a file ###.edi where ### represents the invoice number.



PCLaw creates two copies of the bill. A printable copy uses the template selected on the Billing tab of Matter Manager. Save this copy for your own records. The Data Clearing House template selected on the custom tab in Matter Manager creates an electronic image to be sent to the billing party.

Adding Electronic Billing Tokens to a Template

Pull down menu:	Tools > Template Editor
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Modifying an electronic billing template will affect the functionality of that template resulting in the invoice being rejected. Do not modify an electronic billing template.

You can modify your conventional billing template to display settings that appear on the electronic billing tab. Information from an electronic billing tab can be added to any Miscellaneous section on the billing template. Adding a custom tab token begins the same way as adding any other element.

1. In the **Element Specification** area of the Element Properties window, select **Other > Custom Tab**.
2. Click the **Tab** button.

The CUstom Tab Field Option window appears.

3. In the **Tab Name** box, type the name of the electronic billing tab that contains the field you wish to add or click the **Select** button to the right of the box and choose the tab.
4. In the **Tab Field** box, type the field name that you wish to add or click the **Select** button to the right of the box and choose the field.
5. In the Custom Tab Field Options window, click **OK** to save your selection. The token is added to the template.
6. Repeat this procedure to add additional custom tab tokens.