



# **EAC 581 Group 3**

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## **LexisNexis CounselLink Invoice Review Project**

**Lauren Beecher, Renee Haran, Amy Nelson, Ann Simmons**

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LexisNexis CounselLink is a cloud-based application used by Corporate General Counsel to manage their matter and billing relationships with outside law firms. This report contains a comprehensive Invoice Review course. Included are course instructions, a comprehensive class manual and evaluation instructions and materials.

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## INTRODUCTION

### PROJECT OVERVIEW

#### NEED

*LexisNexis* has a division dedicated to software applications to support the business of law. There are seven different software products targeted to small law firms, large law firms and corporate law departments. All of these products have been acquired by LexisNexis in order to present a full suite of applications to customers of all types and sizes. The most recent acquisition is a product called CounselLink<sup>®</sup>. CounselLink was acquired approximately five years ago and has grown slowly in both customer base and capabilities. The product line is becoming number one in the market of corporate counsel matter management and legal eBilling software.

As a small startup company located in the Silicon Valley, CounselLink had not put much time and effort into the standardization of training classes, documentation or learning materials. Previously, with a small customer base, training was customized and provided only at implementation. All training support was either handled through customer service or internally by the corporate client. In addition to market growth, the CounselLink<sup>®</sup> business is moving from the Silicon Valley to the LexisNexis technology hub at North Carolina State University's (NCSU) Centennial campus. This move will better align the product with other LexisNexis business initiatives. The issue with this move is that there will be a major shift in the labor pool as many current employees have chosen to stay in California, rather than move to North Carolina. With the exponential growth of the customer base and the changing labor pool, there is a need to rethink how CounselLink<sup>®</sup> training is offered.

In response to this need, the NCSU instructional design team created a companion manual to complement an instructor-led training provided by LexisNexis for new users of CounselLink<sup>®</sup> software. After an initial organizational needs analysis conducted by LexisNexis and a training needs analysis conducted by the instructional design team, the NCSU project team designed and developed a comprehensive manual to provide step-by-step instruction for the primary functions in the CounselLink<sup>®</sup> Invoice Review software. Additionally, class facilitation and evaluation tools were created.

#### NEEDS ANALYSIS

Analysis was conducted on organizational and task levels and began with an organizational analysis conducted by LexisNexis followed by a detailed task analysis conducted by the NCSU project team.

LexisNexis currently has no comprehensive standardized course or training materials. The project was subdivided by the two major CounselLink<sup>®</sup> functions, Matter Management and Invoice Review, of which the later was assigned to the NCSU project team. The organizational analysis conducted by LexisNexis revealed the following needs:

- 1) A need based upon the changing workforce (changes in the labor pool are leading to gaps in employee knowledge and skills)
- 2) A need to standardize content for a rapidly growing customer base and
- 3) A desire from the growing customer base for training that goes beyond initial instructor-led implementation training, including the need for a comprehensive class and companion manual that would add value to the current course offerings.

The NCSU project team's analysis focused on the LexisNexis CounselLink<sup>®</sup> software training program and the organizational need for a companion manual to be used during instructor-led training. The primary analysis method used was a series of interviews with the LexisNexis subject matter experts (SMEs) concerning the existing content, current instructional environment and training methods. The SMEs provided access to current training content which included help file documentation, on demand learning objects and instructor led training.

The team conducted a thorough interview with Delphine Pittman, Curriculum Developer at LexisNexis and additional input was later provided by Erin Brown, Training Development Manager. Much of the analysis provided in these interviews was informed by input provided by prior trainees in the general training sessions and requests from users of the software for a reference manual. In the interview with Delphine Pittman, it was determined that LexisNexis currently has a series of custom manuals for specific purposes, but was in need of a general manual for generic purposes. This manual was not intended to be exhaustive, but rather provide instruction that complements the course and a reference for users to have on hand while using the CounselLink<sup>®</sup> software.

The second analysis method used by the NCSU project team was a review of all the current training and documentation offered on CounselLink. This method allowed the project team to assess the current content and training strategies in use. The review resulted in a comprehensive listing of all relevant learning objectives to be included in the manual. A deeper content analysis led to an in-depth content listing for the Invoice Review class manual. Through an iterative process of review and revision, the objectives and content were segmented into logical chapters and final approval was granted by LexisNexis before the development process began.

Practical analysis of the project as a whole revealed style and technology preferences. Style guides and templates were provided by LexisNexis. FrameMaker, a type of publishing software, was the technology to be used in developing the manual, however, since design team members would not have access to the software, the client suggested that the content be developed in Microsoft Word so that LexisNexis staff could convert it to the FrameMaker format.

Through these analyses, it was determined that the team would develop a companion manual, facilitation notes and evaluation methods to be used during instructor led training. LexisNexis would provide access to content needed to develop the manual and ongoing project guidance.

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## DEVELOPMENT

Development was conducted in alpha, beta, and gold phases consistent with a Successive Approximations Model for development (SAM) and feedback was provided from LexisNexis SMEs at each phase. Since technical analyses revealed that LexisNexis develops manuals using Adobe FrameMaker, it was determined that the design and development of an ITL companion manual would be based on a single-source/topic-based architecture rather than a “document” architecture. However, for the ease of incorporating any written topics into LexisNexis’ existing topic architecture and to provide instant use of the final deliverable, all of the written manual topics were delivered as one print-ready Word document.

## COURSE SUMMARY

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## AUDIENCE

The audience for the training included prospective clients and new employees at LexisNexis who do not have prior experience with the CounselLink software. Differentiation was not needed nor desired as the training and manual are responding to a general need for comprehensive training.

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## SUMMARY OF DELIVERABLES

Final deliverables to the client include the following:

- 1) Confirmation of Registration Instructions
- 2) Class facilitation PPT: A small deck of PPT slides including introduction and agenda slides
- 3) Training manual (print-ready)
- 4) Evaluation instruments including:
  - a. Evaluation overview
  - b. Types of evaluation to be conducted
  - c. Evaluation timeline
  - d. Instructional objectives and how they are measured
  - e. Email survey (3-day)
  - f. Survey follow-up (3-month)

Note: All deliverables are included in the appendices of this document.

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## TRAINING PLAN (METHODS/ACTIVITIES)

The comprehensive CounselLink<sup>®</sup> Invoice Review course is an instructor-led course that uses a tell-show-practice methodology. After successfully completing the pre-training activities for the course, learners will receive confirmation for class attendance. On the day of training, course activities will include:

- 1) Sign-in and manual acquisition
- 2) Welcome and introductions
- 3) Training
  - a. PPT introduction
  - b. Chapter facilitation (Some or all chapters, depending on audience need)
    - i. Review chapter TOC
    - ii. Review chapter objectives
    - iii. Explanation and demonstration
    - iv. Practice activities
    - v. Chapter knowledge checks
- 4) Evaluation (Beyond day-of evaluation instruments)

## COURSE OBJECTIVES

**Chapter 1, Getting Started:** To provide users with an overview of the invoice process and sufficient background to understand the process.

Upon successful completion of this chapter, the learner will be able to:

1. Summarize the Invoice Review Process.
2. Define the terms and context behind billing guidelines, invoice rules and workflows.
3. Differentiate the relationship between Billing Guidelines and Invoice Rules.
4. Explain how invoice rules act upon invoice charges.
5. Predict the path an invoice will follow during the client workflow.

**Chapter 2, Accessing CounselLink:** To give learners a comprehensive overview of how to access CounselLink via Website and the CounselLink Add-in for Outlook.

Upon successful completion of this chapter, the learner will be able to:

1. Identify two methods for accessing CounselLink.
2. Demonstrate how to login to the CounselLink website.
3. Identify appropriate solutions for user login and password issues.
4. Find and download the CounselLink Add-in for Outlook from the CounselLink homepage.
5. Demonstrate how to install the CounselLink Outlook Add-in.
6. Make use of CounselLink Add-in for Outlook user settings.
7. Utilize the CounselLink Add-in for Outlook.

**Chapter 3, Locating Ready to Review Invoices:** To show a user how to locate and open invoices that are ready to review.

Upon successful completion of this chapter, the learner will be able to:

1. Access invoices that are ready for review via link sent in email.
2. Locate invoices that are ready for review via the invoice section on the CounselLink Home page.
3. Open an Invoice from an Invoice List.

**Chapter 4, Invoice Review:** To show a user how to review invoices on the summary and charge level, utilizing the CounselLink automated review actions.

Upon successful completion of this chapter, the learner will be able to:

1. Access a comprehensive summary of an invoice by clicking on the invoice number to view an invoice.
2. Determine where an invoice currently exists within the approval process by finding and reviewing the task line.
3. Adjust the invoice fees, expenses or grand total at the summary level.
4. Review the adjustments and flags added during the CounselLink automated review.
5. Convert adjustments to flags and flags to adjustments.
6. Add and calculate personal adjustment amounts to charges and apply the appropriate rule.
7. Add charge level notes.



Chapter 5, Workflow Actions: To instruct the user on the proper workflow action to take after reviewing an invoice.

Upon successful completion of this chapter, the learner will be able to:

1. Move an invoice forward in the workflow.
2. Move an invoice laterally in the workflow.
3. Reject an invoice back to the law firm.

Chapter 6, Invoice Searching: To demonstrate how a user can locate invoices using the Invoice Search Tab and the Quick Search bar.

Upon successful completion of this chapter, the learner will be able to:

1. Conduct a Quick Search for an invoice using key word or invoice number.
2. Find invoices by using the Invoice Search Tab to select the appropriate query criteria.
3. Customize an invoice search by changing column headings.
4. Save invoice searches for future reference.

Chapter 7, Additional Invoice Features: To identify and demonstrate advanced functionality for invoice review.

Upon successful completion of this chapter, the learner will be able to:

1. Determine when it is appropriate to combine invoices.
2. Combine multiple invoices in order to view them together.
3. Locate, view and/or add payment information.
4. Add invoice level notes.
5. Edit the allocation details on an individual invoice.
6. Add documents to an individual invoice.
7. Locate and view the history of an individual invoice.
8. Print the invoice summary or detail.

Chapter 8, Help Resources: To inform a user of the resources available for additional support.

Upon successful completion of this chapter, the learner will be able to:

1. Summarize the help resources available for CounselLink.
2. Demonstrate the use of the Help Files for CounselLink.
3. Make use of LexisNexis University's On Demand Training for CounselLink.

## COURSE CONTENT OUTLINE

### Chapter 1: Getting Started

1. Invoice Process Overview
2. Billing guidelines
3. Invoice rules
4. Invoice workflow

### Chapter 2: Accessing CounselLink

1. Accessing CounselLink via Website
2. Accessing CounselLink using the CounselLink Add-in for Outlook

### Chapter 3: Locating Ready to Review Invoices

1. Locating and accessing Invoices ready for review

### Chapter 4: Invoice Review

2. Comprehensive summary of an invoice
3. Summary level review
4. Charge Level Review

### Chapter 5: Workflow Actions

1. Move forward
2. Move laterally
3. Reject to return to law firm
4. Other actions available to administrative users

### Chapter 6: Invoice Searching

1. Perform a Quick Search of invoices
2. Perform an invoice search using the Invoice Search tab
3. Conducting a customized Invoice Search
4. Saving invoice searches

### Chapter 7: Additional Invoice Features

1. Invoice Search Tab: Results list-advanced options
2. Combine invoices
3. Payment Data
4. Invoice level notes
5. Edit allocation at invoice level
6. Add documents to invoice
7. View history of invoice
8. Print invoice

### Chapter 8: Help Resources

1. Customer Support
2. Help Files
3. LexisNexis University

## PRE-TRAINING ACTIVITIES

This section will outline the processes and activities required to request/register and prepare for an Invoice Review Class.

### REGISTRATION PROCESS

#### **Internal Registrants**

LexisNexis employees may plan and schedule Invoice Review classes by contacting the manager of training delivery, Elena Cutri, [elena.cutri@lexisnexis.com](mailto:elena.cutri@lexisnexis.com). Class sessions should be limited to no more than 12 students.

#### **External Registrants: Public Class**

Invoice Review Class will be scheduled 6 times a year and on a requested basis. Class scheduling and registration information is available on LexisNexis University (LNU), [www.lexisnexis.com/university](http://www.lexisnexis.com/university). Class sessions should be limited to no more than 12 students.

To register for a class session, external registrants will access LexisNexis University and locate a class session they would like to attend. Class scheduling, location, pricing and length are all available on the LNU website. To register for class, participants need to click the 'register' button for the proper class session. Participants will enter payment information to complete the registration process.

#### **External Registrants: Private Class**

Any client or prospective client of LexisNexis CounselLink may schedule an Invoice Review class. This request may be made through your sales account manager, implementation project manager or directly by emailing [Intraining@lexisnexis.com](mailto:Intraining@lexisnexis.com). Class sessions should be limited to no more than 12 students.

Sales account managers and implementation project managers will work with the manager of training delivery, Elena Cutri, [elena.cutri@lexisnexis.com](mailto:elena.cutri@lexisnexis.com) to plan and schedule private training sessions. Private sessions may be held at the LexisNexis Training center or onsite at a location determined by the client.

### REGISTRATION CONFIRMATION

#### **Internal Registrant Confirmation**

Class is confirmed through the training manager after a date and time has been discussed and the LexisNexis training room has been reserved. Pre-training activities will also be forwarded to the registrants.

#### **External Registrants: Public Class Confirmation**

Class is confirmed via email. When payment information is confirmed by LNU, a confirmation email with instructions for locating the LexisNexis training facility and recommendations for accommodations,

dining and travel will be sent. Pre-training activities will also be forwarded to the registrants. See [Appendix A](#) for a representative email.

### **External Registrants: Private Class Confirmation**

Class is confirmed through communication between the training manager and the client contact. Class may be held at the LexisNexis training facility or the client site. Pre-training activities will also be forwarded to the registrants.

### **PRE-TRAINING ACTIVITIES**

It is recommended that any person, internal or external, should review the OnDemand training modules pertaining to Invoice Review. Reviewing the OnDemand modules will allow students to familiarize themselves with the look and feel of CounselLink. It will also introduce terminology that will be used in the class. Finally, it should give the students basic information that can be expanded upon and discussed in the training session. The OnDemand training modules are available on the LNU site. Class attendees will need to:

1. Access the LNU website: [www.lexisnexis.com/university](http://www.lexisnexis.com/university)
2. Register for a LNU account, if they do not already have one
3. Access the Current Schedule of Classes for CounselLink Corporate
4. Select the OnDemand Module and Launch it
5. Review the Invoices section

## REQUIRED RESOURCES AND MATERIALS

This is a comprehensive listing of resources and materials needed to conduct an Invoice Review Class session.

## ROOM & EQUIPMENT REQUIREMENTS

The LexisNexis training facility is equipped with student workstations with internet connections, instructor workstation, projector and projection screen.

Room requirements for classes held outside the LexisNexis training facility

- Classroom or Conference Room
  - At least 12 seats
  - Projector
  - Projection screen
- Student workstations
  - Laptop or PC
  - Each station must have internet connection
- Instructor workstation
  - Internet connection required
  - Instructor will provide their own laptop

## CLASS SESSION REQUIREMENTS

- Evaluation Materials, see [Appendix D](#)
  - [Knowledge Checklists](#)
- Instructor PowerPoint, see [Appendix B](#)
- Instructor facilitation instructions
- Printed Manual for each student, see [Appendix C](#)
- Surplus pens, pencils and note pads
- Laser pointer
- Catering for sessions held at LexisNexis facility
  - Catering Station stocked with beverages and light snacks
  - Catering for meals
    - Either Breakfast or Lunch should be served depending on timing of session
    - The GRECS department contact at the Varsity Drive building will arrange catering of meals.

Catering for sessions held at client location: recommend light snacks and at least one meal.

## FACILITATION INSTRUCTIONS

The purpose of the facilitator handbook is to outline the **sequence and procedures** for conducting Counsellink training. Using the guide can help with time management and ensures that each topic area is addressed. Estimated times for the sessions are given for each chapter.

## CHAPTER GOALS

The manual was developed as a reference for participants during classroom training or may be used for reference for self-directed learning outside of the classroom. The manual consists of 8 chapters:

1. Getting Started
2. Accessing Counsellink
3. Locating Ready to Review Invoices
4. Invoice Review
5. Workflow Actions
6. Invoice Searching
7. Additional Invoice Features
8. Help Resources

**Chapters 1 and 2** will introduce participants to Counsellink and show them how to access and set up the program for operation.

**Chapters 2-8** are designed to teach the participants how to use the software to perform specific invoice review tasks.

- As the facilitator demonstrates **Invoice Review** functions participants will be able to follow step-by-step instructions in the manual.
- Participants will practice what they learn by completing the practice activities at the end of each chapter. Chapters are divided into the following topic areas:
  - Content overview
  - Learning Objectives
  - Explanation of **Counsellink** features
  - Screen shots that illustrate **Counsellink** features
  - Step-by-step instructions
  - Practice activities

## PREPARATION FOR TRAINING

The facilitator should review the Counsellink training website, become familiar with the layout of the manual, and the [Instructor PowerPoint](#) presentation prior to presenting the material. The facilitator should also prepare the [Required Resources and Materials](#)

## TRAINING SEQUENCE AND PROCEDURES

Have participants sign in upon arrival and provide each with a copy of the [Invoice Review Training Manual](#). Once everyone is seated and it is time to begin, welcome the participants to the session.

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### WELCOME AND INTRODUCTIONS

- Good morning/afternoon. My name is \_\_\_\_\_ and I will be your facilitator today. *The facilitator may wish to share a little of their experience and background.*
- Explain where restrooms are located, when participants can expect breaks, smoking policies, location of water fountains, etc.
- Ask participants to share their names and their roles where they work. *This information will function as an ice breaker and allow you to customize how you explain various tasks as you work through the chapter(s).*

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### CONDUCTING THE TRAINING

- Several chapters may be covered during the training or groupings of chapters may be used as shorter, targeted training sessions.
- Use the [Instructor PowerPoint](#) presentation to introduce CounselLink to participants even if only one chapter is being taught.
- Provide breaks for students approximately every 45 minutes. Breaks should coincide with the end of a chapter of instruction.
- Evaluations may be administered at the end of each chapter if desired.

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### SUGGESTIONS FOR PRESENTING THE CONTENT IN EACH CHAPTER:

- Review the table of contents for each chapter.
- Review the chapter objectives. Tell participants that these are the skills they should be able to perform as a result of participating in this training.
- Explain and demonstrate the CounselLink functions. Tell participants that they may work through the steps as the instructor demonstrates them or they may follow along in their manuals and take notes, as they will have the opportunity to practice at the end of the session.
- Tell the participants that they may stop the facilitator if a task needs to be explained more fully.
- Engage the participants by asking open-ended questions and encouraging them to share and ask questions.

## FACILITATE CHAPTER 1: GETTING STARTED

Estimated training time: 35-50 minutes

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### WELCOME AND INTRODUCTIONS (5-15 MINUTES)

See suggestions for [welcome and introduction](#) in the general instructions. Timing is dependent on class enrollment.

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### OVERVIEW OF THE TRAINING (5 MINUTES)

In this chapter you will learn how CounselLink can help corporate counsel review and process invoices. Refer to the Table of Contents for topics to be covered in this chapter. Refer to the objectives on page 6 of the student manual.

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### TEACHING ACTIVITIES (20 MINUTES)

- Page 7: Explain the invoice process. Show progressive graphic on projection screen during explanation.
- Page 8: Discuss billing guidelines and demonstrate how to view billing guidelines.
- Page 9: Explain invoice rules and the actions taken when a rule is violated.
- Page 10: Explain invoice workflow and the general rules. Reference the graphic on page 10.
  - Invoice workflow graphic –may vary according to each client’s needs.

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### STUDENT PRACTICE (5-10 MINUTES)

- Page 11: Practice Activity
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about the invoice process, billing guidelines or invoice rules.*

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### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*



## FACILITATE CHAPTER 2: ACCESSING COUNSELLINK

Estimated training time: 45 minutes

### OVERVIEW OF THE TRAINING (5 MINUTES)

In this chapter we will discuss how to access CounselLink through the website and the CounselLink Add-in for Outlook. You will become familiar with basic CounselLink settings and functions to help you get started quickly. Refer to the Table of Contents for topics to be covered in this chapter. Review objectives on page 12 of the student manual.

### TEACHING ACTIVITIES (30 MINUTES)

- Page 13: Provide a background or basis of information for accessing CounselLink
  - Explain that CounselLink is a
  - Provide a listing of supported browsers
  - Demonstrate how to access the CounselLink website.
- Page 14: Demonstrate resetting a forgotten password.
- Page 15: Discuss the purpose and advantages of downloading the CounselLink Add-in for Outlook.
  - Explain the system requirements for downloading.
- Page 16: Demonstrate how to install the Add-in for Outlook.
  - Briefly discuss technical details.
- Page 17: Demonstrate how to access the CounselLink Add-in for Outlook Settings.
  - Demonstrate how to activate and deactivate the Add-in pane.
  - Explain the auto login feature and how to enter credentials.
  - Briefly mention settings for attached documents and calendar events. They are applicable to the Matter Management class.

### STUDENT PRACTICE (10 MINUTES)

- Page 18: Practice Activities (3)
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about accessing CounselLink, via website or Add-in.*

### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on

student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*

## FACILITATE CHAPTER 3: LOCATING READY TO REVIEW INVOICES

Estimated training time: 25 minutes

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### OVERVIEW OF THE TRAINING (5 MINUTES)

This chapter will cover Locating Ready to Review Invoices. You have already learned how to navigate to the CounselLink website. Now we will locate invoices that require your review. Refer to Table of Contents for topics to be covered. Review objectives on page 20.

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### TEACHING ACTIVITIES (15 MINUTES)

- Page 21: Explain and demonstrate the notification process from CounselLink via email.
- Page 22: Demonstrate how to locate invoices that are ready for review from the CounselLink Homepage and from the Outlook Add-in.
- Page 23: Demonstrate the steps to open an invoice from an Invoice List.

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### STUDENT PRACTICE (5 MINUTES)

- Page 24: Practice Activity
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about accessing invoices that require review.*

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### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*

## FACILITATE CHAPTER 4: INVOICE REVIEW

Estimated training time: 50-55 minutes

### OVERVIEW OF THE TRAINING (5 MINUTES)

This chapter covers Invoice Review, which is the primary feature in CounselLink. You will learn how to review invoices on the summary and charge levels. Refer to the Table of Contents for topics to be covered. Review the objectives on page 25.

### TEACHING ACTIVITIES (35 MINUTES)

- Page 26: Explain the comprehensive summary of an invoice.
  - Recall locating and opening a ready to review invoice.
  - Explain layout and location of important information.
- Page 27: Explain the Summary Mini-tab.
  - Demonstrate how to adjust an invoice at the summary level.
- Page 28: Explain the Charges Mini-tab.
  - Explain the significance of color-coded text.
  - Explain the information viewable by client and law firms.
  - Demonstrate how to view a history of changes made to a charge.
- Page 29-32: Discuss the possible actions for each charge line within the Charges mini-tab.
  - Discuss and demonstrate actions for automatic adjustments.
  - Discuss and demonstrate actions for automatically flagged charges.
  - Discuss and demonstrate how to adjust a charge from scratch.
  - Discuss and demonstrate how to add a note to a charge.
- Page 30: Demonstrate the actions that may be taken for each item within the charges mini-tab.

### STUDENT PRACTICE (10-15 MINUTES)

- Page 33 Practice Activities (2)
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about reviewing invoices.*

### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*

## FACILITATE CHAPTER 5: WORKFLOW ACTIONS

Estimated training time: 35 minutes

### OVERVIEW OF THE TRAINING (5 MINUTES)

This chapter will cover Workflow Actions. Refer to the Table of Contents to explain the topics that will be covered. Review the objectives on page 34.

### TEACHING ACTIVITIES (20 MINUTES)

- Explain Workflow actions
  - Discuss function of workflow actions
  - When to apply an action
  - Where to find the actions
- Page 35: Explain moving an Invoice forward in the Workflow
  - Explain the uses of Complete and Approve
  - Demonstrate Action
- Page 36: Explain moving an invoice laterally in the Workflow.
  - Explain the uses of Assign and Re-assign
  - Demonstrate Action
- Page 37: Explain moving an invoice back to a law firm
  - Explain the use of Reject
  - Demonstrate how to reject an invoice.
  - Stress the need to enter a note to explain the reason for rejecting an invoice.

### STUDENT PRACTICE (10-15 MINUTES)

- Page 38 Practice Activities (2)
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about reviewing invoices.*

### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on

student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*

## FACILITATE CHAPTER 6: INVOICE SEARCHING

Estimated training time: 50 minutes

---

### OVERVIEW OF THE TRAINING (5 MINUTES)

This chapter will cover to access invoices through the two search functions. Refer to the Table of Contents to explain the topics that will be covered. Review the objectives on page 39.

---

### TEACHING ACTIVITIES (30 MINUTES)

- Page 40: Explain the quick search function.
  - Demonstrate how to execute a quick search of invoices.
  - Show the TIPS link for additional guidance on searching.
- Page 41: Discuss and demonstrate adding custom client information to a quick search.
- Page 42: Explain the multi-criteria search function.
  - Demonstrate how to perform a Multi-Criteria Search.
  - Demonstrate how to change search criteria fields.
- Page 43: Discuss and demonstrate how to narrow search results
  - Explain options for adding search criteria.
  - Search within a search.
- Page 44: Discuss and demonstrate how to customize search list columns.
  - Demonstrate how to access edit options.
  - Demonstrate the modification of sort and columns.
- Page 45: Discuss and demonstrate how to save an invoice search.
  - Show and demonstrate how to execute a saved search.

---

### STUDENT PRACTICE (15 MINUTES)

- Page 46 Practice Activities (5)
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about reviewing invoices.*

---

### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*

## FACILITATE CHAPTER 7: ADDITIONAL INVOICE FEATURES

Estimated training time: 75 minutes

### OVERVIEW OF THE TRAINING (5 MINUTES)

This chapter will cover Additional Invoice Features. Refer to the Table of Contents to explain the topics that will be covered. Review the objectives on page 47.

### TEACHING ACTIVITIES (60 MINUTES)

- Page 48-51: Explain how to utilize the additional actions on the multi-criteria search result page.
  - Demonstrate the add note feature.
  - Explain use of and demonstrate deleting an invoice.
  - Explain workflow actions from search result page.
  - Introduce combining invoices: detailed on next action.
  - Demonstrate print and export of invoice information.
- Page 52-53: Explain use of combining invoices
  - Demonstrate combining invoices from basic invoice search results.
  - Demonstrate combining invoices from Invoice and Matter overview page.
- Page 54: Explain how payment data can be used.
  - Demonstrate how to locate and view payment data.
  - Demonstrate how to enter and delete payment data.
- Page 55: Discuss how invoice level notes can be used.
  - Demonstrate how to add notes to invoice.
- Page 56: Demonstrate how to edit allocations at the invoice level.
- Page 57: Discuss and demonstrate adding documents to invoices
- Page 58: Demonstrate how to view the history of an invoice.
- Page 58: Demonstrate how to print an invoice from the invoice overview page.

### STUDENT PRACTICE (10 MINUTES)

- Page 59 Practice Activities (2)

- Students should practice skills on their own.
- After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions*

---

#### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*

#### FACILITATE CHAPTER 8: HELP RESOURCES

Estimated training time: 50 minutes

---

#### OVERVIEW OF THE TRAINING (5 MINUTES)

This chapter will cover the help resources. Refer to the Table of Contents to explain the topics that will be covered. Review the objectives on page 60.

---

#### TEACHING ACTIVITIES (30 MINUTES)

- Page 61: Explain and demonstrate how to contact customer support.
- Page 62: Demonstrate how to access the help files.
- Page 63: Show how to access additional training through LexisNexis University.

---

#### STUDENT PRACTICE (10 MINUTES)

- Page 64 Practice Activities (2)
  - Students should practice skills on their own.
  - After attempting skills, facilitator can guide through if necessary.
- Question and Answer opportunity. *Ask if there are any questions about reviewing invoices.*

---

#### EVALUATION (5 MINUTES)

The facilitator should have the [Knowledge Checklist](#) on hand to track student progress against the course objectives. The checklist can simply track skill achievement or the facilitator can keep notes on

student reaction, issues concerning sequence and material covered and general notes for future sessions and ways to make the class more successful.

The facilitator should fill out the checklist when it is convenient during the section. The checklist can also prompt the facilitator during the question and answer opportunity.

*Note: Facilitator may provide a small break depending on length of section, otherwise, continue to next section.*



## EVALUATION PLAN AND INSTRUCTIONS

### EVALUATION OVERVIEW

Evaluation for this program will focus on summative evaluation. In addition, some confirmative evaluation will be utilized to ensure that the training and manual remain relevant for the target population of users. Formative evaluation measures were used in the development of the manual utilizing reviews by subject matter experts and internal reviews by other team members. Formative evaluation measures will continue to be utilized to improve the current course and accompanying manual, in addition to ensuring that future instructional development (based on plans provided by the NCSU instructional design team) meets organizational and client needs for LexisNexis.

### TYPES OF EVALUATION

- *Subject Matter Expert review* – The NCSU Instructional Design team has utilized various SME’s from LexisNexis throughout the development process. In addition, an SME will review the course, manual and evaluation instruments as a comprehensive whole prior to when the final product is delivered to LexisNexis for use.
- *Checks for understanding conducted by the instructor* – When conducted frequently and knowledgeably, these informal evaluation techniques can be very effective in identifying areas of instruction that need to be retaught in the moment. When an instructor identifies an instructional objective that students are not mastering in the midst of teaching, he or she has the opportunity to isolate the instructional issue and clarify, expand upon, or reteach as necessary.
- *Phone interviews for a statistically-relevant sample of participants* – Simple random sampling will be utilized to conduct phone interviews by which participants will be asked questions relating to how effective the course and corresponding manual have been in their utilization of Counsellink. This will help to evaluate training transfer and provide formative data for improving future instruction.
- *Surveys sent by email to all participants three days after the course* – These email surveys will focus on determining students’ perception of how informative and helpful the course was in their use of Counsellink software.
- *Surveys sent by email to all participants three months after the course* – These email surveys will isolate key instructional objectives and evaluate students’ perception of their skill level prior to and after training.
- *Review of questions that come into LexisNexis call center* – A simple analysis of calls that come into the call help center will be done to determine if the calls are: 1) coming from individuals who participated in the training, & 2) if the issue is one that was covered in the training and/or manual

## TIMELINE FOR EVALUATION

<b>Time</b>	<b>Evaluation measure</b>	<b>Person(s) responsible</b>
During course development	Subject Matter Expert review	LexisNexis SMEs
During course	Checks for understanding	Instructors
Immediately after course	Content quiz	Instructors
Three days after course	Email survey	LexisNexis training department
One month after course	Phone interviews to a sample of course participants	LexisNexis training department
Twice annually	Supervisor reports on employee use and knowledge of CounselLink	LexisNexis training department
Twice annually	Review of frequent questions called into the LexisNexis call center & analysis of those who have and have not participated in course	LexisNexis training department

## EVALUATION VALIDITY AND RELIABILITY

Validity in evaluation can be difficult to ensure. Face validity has been addressed by a review of several subject matter experts from within LexisNexis. In order to deliver content validity for the comprehensive evaluation plan, a chart of all instructional objectives and how each is measured is provided below. This helps to ensure that, the highest degree possible; the evaluation measures are assessing the objectives that are being taught.

In order to provide reliability in evaluation, instructional objectives will be measured in a variety of ways and the assessment will be delivered in a standardized format by providing clear instructions for the instructors and standardized evaluation instruments. Additionally, assessments will be conducted at the time of instruction in addition to six months after students have taken the class

## COMPREHENSIVE LIST OF INSTRUCTIONAL OBJECTIVES

<b>Getting Started</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Summarize the invoice review process (1a)	<ul style="list-style-type: none"> <li>• SME (Subject Matter Expert) review</li> <li>• Instructor check for understanding</li> </ul>	Comprehension
Define the terms and context behind billing guidelines, invoice rules and workflows (1b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Phone interviews</li> </ul>	Knowledge
Differentiate the relationship between Billing Guidelines and Invoice Rules (1c)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Analyze
Explain how invoice rules act upon invoice charges (1d)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Comprehension
Predict the path an invoice will follow during the client workflow (1e)	<ul style="list-style-type: none"> <li>• SME (Subject Matter Expert) review</li> <li>• Instructor check for understanding</li> </ul>	Evaluate

<b>Accessing Counsel Link</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Identify two methods for accessing CounselLink (2a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Phone interviews</li> </ul>	Knowledge
Demonstrate how to log in to the CounselLink website (2b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application
Identify appropriate solutions for User Login ID and password issues (2c)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Knowledge
Find and download the CounselLink Add-In for Outlook from the CounselLink <b>Home</b> page (2d)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Demonstrate how to install the CounselLink Outlook Add-In (2e)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Make use of the CounselLink Add-In for Outlook user settings (2f)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Utilize the CounselLink Add-In for Outlook (2g)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application

<b>Locating Ready to Review Invoices</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Access invoices that are ready for review via link sent in email. (3a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Phone interviews</li> </ul>	Application
Locate invoices that are ready for review via the Invoice section on the CounselLink <b>Home</b> page. (3b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application
Open an invoice from an Invoice List. (3c)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application

<b>Invoice Review</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Access a comprehensive summary of an invoice (4a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application
Determine where an invoice currently exists within the approval process (4b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application
Adjust the invoice fees, expenses or grand total at the summary level (4c)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Review the adjustments and flags added during the CounselLink automated review (4d)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application
Convert adjustments to flags and flags to adjustments (4e)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application
Add and calculate adjustment amounts to charges and apply the appropriate rule (4f)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Phone interviews</li> </ul>	Application
Add charge level notes (4g)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application

<b>Workflow Actions</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Move an invoice forward in the workflow. (5a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> <li>• Email survey (3 month)</li> </ul>	Application
Move an invoice laterally in the workflow. (5b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application
Reject an invoice back to the law firm. (5c)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application

<b>Accessing Invoices</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Enter a keyword or invoice number to find an invoice using Quick Search (6a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application
Access the Invoice Search page to find an invoice (6b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application
Modify column headings and use those headings to search for an invoice. (6c)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Save a search, then view the saved search (6d)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application

<b>Additional Invoice Features</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Utilize the additional features on the Invoice List. (7a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application
Determine when it is appropriate to combine invoices. (7b)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Analyze
Combine multiple invoices in order to view them together. (7c)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Locate, view, and/or add payment information. (7d)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Add invoice level notes. (7e)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> </ul>	Application
Edit the allocation details on an individual invoice. (7f)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Add documents to an individual invoice. (7g)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Locate and view the history of an individual invoice. (7h)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application
Print the invoice summary or detail. (7i)	<ul style="list-style-type: none"> <li>• SME review</li> </ul>	Application

<b>Help Resources</b>		
<b>Instructional objective</b>	<b>Measurement instrument(s)</b>	<b>Skill Level</b>
Summarize the help resources available for CounselLink. (8a)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Instructor check for understanding</li> <li>• Phone interviews</li> </ul>	Comprehension
Demonstrate the use of the Help Files for CounselLink. (8b)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Email survey (3 month)</li> </ul>	Application
Make use of LexisNexis University's On Demand Training for CounselLink. (8c)	<ul style="list-style-type: none"> <li>• SME review</li> <li>• Phone interviews</li> </ul>	Application

## REFERENCES

Morrison, G. R., Ross, S. M., Kalman, H. K. & Kemp, J. E. (2011). *Designing Effective Instruction*. Hoboken, New Jersey: Wiley.

Russ-Eft, D. & Preskill, H. (2009). *Evaluation in Organizations: A systematic approach to enhancing learning, performance, and change*. New York, New York: Basic Books.



## APPENDIX A: REGISTRATION CONFIRMATION EMAIL

Dear *name of registrant*,

Your registration for the CounselLink Invoice Review class has been confirmed for *date* and *time*. We look forward to your attendance. Below you will find pre-training recommendations, class timing and directions to our training facility. You will also find relevant travel and accommodation information should you require it.

### **Pre-Training recommendations**

It is recommended that you review the OnDemand training modules pertaining to Invoice Review. Reviewing the OnDemand modules will familiarize you with the look and feel of CounselLink. It will also introduce the terminology we will use in class. Finally, it should give you basic information that we can expand upon and discuss during the training session. The OnDemand training modules are available on the LNU site.

Instructions:

1. Access the LNU website: [www.lexisnexis.com/university](http://www.lexisnexis.com/university)
2. Register for a LNU account, if you do not already have one
3. Access the Current Schedule of Classes for CounselLink Corporate
4. Select the OnDemand Module and Launch it
5. Review OnDemand courses the Invoices section

### **Class Timing**

Arrive at the Training facility 5-15 minutes before the scheduled start of class. Class will take no more than four hours. Breaks will be provided every hour. Beverages and light snack will be provided continuously throughout the session. Lunch will be served before class departure.

### **Directions to training facility**

The LexisNexis training facility is located on North Carolina State University's Centennial campus. The physical address is 1801 Varsity Drive. Parking is available in the deck directly adjacent to the LexisNexis building. Enter the building and check in with the reception desk. You will be provided with a temporary access badge and directed to the training room.

## **Travel accommodations**

The closest airport: Raleigh-Durham International (RDU)


Hotels: There are many hotels in the Crossroads area of Cary. There is ample shopping and numerous restaurants in the area as well.

- Hilton Garden Inn: 131 Columbus Ave, Cary NC
- Doubletree by Hilton: 500 Caitboo Ave, Cary NC
- Holiday Inn Hotel and Suites: 5630 Dillard Dr, Cary NC


SLIDE 1

**LexisNexis  
CounselLink**

Invoice Review Training

 LexisNexis®

SLIDE 2

 LexisNexis® **CounselLink**

CounselLink®

**Log In to LexisNexis® CounselLink®**

Login ID:   
Password:   
**Log In**


[Forgot Your Password?](#)  
[New Law Firm Sign Up?](#)

**Looking for a Corporate Counsel Solution?**  
CounselLink is a legal spend and matter management system designed to optimize the relationship between corporate law departments and their outside counsel. Find out [more](#) about what CounselLink has to offer!

**Are you a Law Firm New to CounselLink?**  
CounselLink enables law firms the years to collaborate electronically with customers—easily, securely, and online. If your client has requested you use CounselLink to manage matters and submit invoices, you can sign up at left, click "New Law Firm Sign Up!"

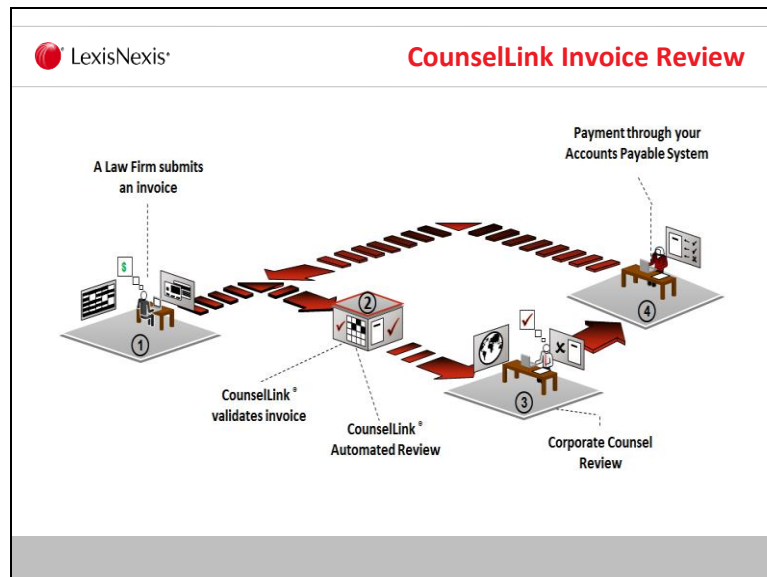
**Need Support Now? We're available 24x7!**  
Our Customer Support team is available to troubleshoot your matter and e-billing issues 365 days a year, 24 hours a day, 7 days a week. Contact support for help with password resets, invoice status or feature walk-through.

To reach our telephone support representatives, US customers may call 1-800-600-2282, option 2; Our international customers may call +1-516-679-3899. For email support, please contact us at [psa@lexiscounsel.com](mailto:psa@lexiscounsel.com).

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LexisNexis® **Introduction to CounselLink**

- CounselLink allows you to 'link' with the law firms handling your matters.
- Both you and your law firms will be able to access and manage the invoicing process through the web interface of CounselLink.net.
- CounselLink Invoice Review Training will provide you with the skills you need to use CounselLink features.



CounselLink Training demonstrates the Invoice process from the time a law firm submits an invoice until it is paid through your accounts payable system.

SLIDE 5

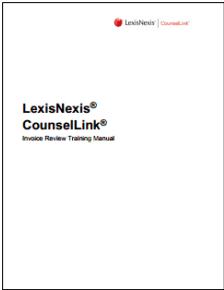
LexisNexis® **CounselLink Invoice Training**

- You will have the opportunity to see the software demonstrated.
- You will be able to follow along in your CounselLink Invoice Review Training Manual.
- You may work through the exercises as the facilitator demonstrates them or you may listen and watch.
- You will have opportunities to practice what you have learned at the end of each chapter.

SLIDE 6

LexisNexis® **CounselLink Invoice Review Training Manual**

Your step-by-step reference



The image shows the cover of the training manual. It features the LexisNexis logo at the top left, followed by the text 'LexisNexis® CounselLink® Invoice Review Training Manual'. The cover is white with a thin black border.

LexisNexis®	CounselLink Training Agenda
Welcome	
Introductions	
Overview of the Training	
Training Activities	
Practice Activities	
Evaluation	

This is the basic agenda for each Chapter to be covered. You are encouraged to ask questions during the training and try out the CounselLink features.

## APPENDIX C: INVOICE REVIEW MANUAL

The invoice review manual is formatted to be printed in booklet form. Please refer to the Invoice Review Manual file to access and print.

## APPENDIX D: EVALUATION INSTRUMENTS

### KNOWLEDGE CHECKLISTS

The checklists on the following pages are intended to guide the facilitator to track student learning during class. The facilitator will update the checklist during and after each section. The facilitator will check off when learning is achieved. The facilitator may also keep notes on student progress or general notes on the session, including problems during session or ideas for class additions. There is one checklist for each chapter.

The checklists start on the next page. Simply print them out.



## Getting Started

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	Summarize the invoice review process (1a)	Define the terms and context behind billing guidelines, invoice rules and workflows (1b)	Differentiate the relationship between Billing Guidelines and Invoice Rules (1c)	Explain how invoice rules act upon invoice charges (1d)	Predict the path an invoice will follow during the client workflow (1e)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					

## Accessing Counsel Link

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	Identify two methods for accessing CounselLink (2a)	Demonstrate how to log in to the CounselLink website (2b)	Identify appropriate solutions for User Login ID and password issues (2c)	Find and download the CounselLink Add-In for Outlook from the CounselLink Home page (2d)	Demonstrate how to install the CounselLink Outlook Add-In (2e)	Make use of the CounselLink Add-In for Outlook user settings (2f)	Utilize the CounselLink Add-In for Outlook (2g)
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							

## Locating Ready to Review Invoices

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	<p>Access invoices that are ready for review via link sent in email. (3a)</p>	<p>Locate invoices that are ready for review via the Invoice section on the CounselLink Home page. (3b)</p>	<p>Open an invoice from an Invoice List. (3c)</p>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

## Invoice Review

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	<p>Access a comprehensive summary of an invoice (4a)</p>	<p>Determine when an invoice currently exists within the approval process (4b)</p>	<p>Adjust the invoice fees, expenses or grand total at the summary level (4c)</p>	<p>Review the adjustments and flags added during the Counsellink automated review (4d)</p>	<p>Convert adjustments to flags and flags to adjustments (4e)</p>	<p>Add and calculate adjustment amounts to charges and apply the appropriate rule (4f)</p>	<p>Add charge level notes (4g)</p>
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							

## Workflow Actions

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	<p>Move an invoice forward in the workflow. (5a)</p>	<p>Move an invoice laterally in the workflow. (5b)</p>	<p>Reject an invoice back to the law firm. (5c)</p>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

## Accessing Invoices

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	<p>Enter a keyword or invoice number to find an invoice using Quick Search (6a)</p>	<p>Access the Invoice Search page to find an invoice (6b)</p>	<p>Modify column headings and use those headings to search for an invoice. (6c)</p>	<p>Save a search, then view the saved search (6d)</p>
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				

## Additional Invoice Features

Participant Name	Utilize the additional features on the Invoice List. (7a)	Determine when it is appropriate to combine invoices. (7b)	Combine multiple invoices in order to view them together. (7c)	Locate, view, and/or add payment information. (7d)	Add invoice level notes. (7e)	Edit the allocation details on an individual invoice. (7f)	Add documents to an individual invoice. (7g)	Locate and view the history of an individual invoice. (7h)	Print the invoice summary or detail. (7i)
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									
11.									
12.									

## Help Resources

<p><i>Instructional objectives highlighted in grey are the focus for checks for understanding during instruction. Others may be tracked as time allows.</i></p> <p>Participant Name</p>	<p>Summarize the help resources available for CounselLink. (8a)</p>	<p>Demonstrate the use of the Help Files for CounselLink. (8b)</p>	<p>Make use of LexisNexis University's On Demand Training for CounselLink. (8c)</p>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			



**EMAIL SURVEY – 3 DAY**

This survey is intended to be sent out to users three days after they participate in the course.

Date \_\_\_\_\_ Course Title \_\_\_\_\_

What is your current job title? \_\_\_\_\_

**How long have you been at this job?**

- 3 months or less
- 3-6 months
- 6-12 months
- 1-2 years
- 3 years or more

**Was this course challenging?**

- Very hard
- Hard
- Just right
- Easy
- Very easy

**How did you find the course?**

- Very informative
- Somewhat informative
- Fairly informative
- Not very informative
- Not at all informative

**When using CounselLink, do you know how to utilize the features you need?**

- Always
- Usually
- Sometimes
- usually not
- Never

**Will the course help you utilize CounselLink better?**

- Significantly better
- Somewhat better
- About the same
- Worse
- Significantly worse

**What would you change?**

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**What did you like?**

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**EMAIL SURVEY – THREE MONTH FOLLOW-UP**

This survey is intended to be sent out to users three months after they participate in the course.

**For each of the following skills, please indicate:** Your skill level prior to training and your current skill level utilizing course instruction and corresponding manual

Skill	Skill not used	Skill Level Prior to Training			Current Skill Level		
		Poor	Average	Excellent	Poor	Average	Excellent
Understanding how invoice rules act upon invoice charges (1d)							
Utilizing the CounselLink Add-In for Outlook (2g)							
Locating invoices that are ready for review via the Invoice section on the CounselLink <b>Home</b> page. (3b)							
Accessing a comprehensive summary of an invoice (4a)							
Reviewing the adjustments and flags added during the CounselLink automated review (4d)							
Moving an invoice forward in the workflow. (5a)							
Moving an invoice laterally in the workflow. (5b)							
Entering a keyword or invoice number to find an invoice using Quick Search (6a)							
Utilizing the Help Files for CounselLink. (8b)							

