Law Firm Frequently Asked Questions

Q: It’s my first time using CounselLink. How do I get started?
A: Contact Lexis Nexis CounselLink Customer Support at (800) 600-2282 or ask@lexisnexis.com. To learn more about CounselLink, visit www.counsellink.net.

Q: How do I acknowledge UE’s Defense Counsel Guidelines?
A: From the CounselLink home page, click the Info Center tab, click the Billing Guidelines link to review the guidelines and/or print for your reference. After you complete your review, check Next to read the Acknowledgement statement and select Accept.

Q: What additional information needs to be completed about the law firm?
A: UE requests all firms working with us to complete the Law Firm Diversity Survey. Access the survey from the Law Firm Profile page. After entering the requested information, click Save survey response and then select Share with clients and select UE in the next screen.

Q: How do I locate an assigned Claim?
A: Log on to www.counsellink.net.
   - Select United Educators in the upper left corner of your CounselLink Home page. Click the Matters tab.
   - If you do not see a particular matter, contact the claims handler to ensure the matter was added and that your firm was assigned.

Q: How do I submit a budget?
A: Within 60 days of matter assignment, submit a budget for approval by the claims handler.
   - Access the matter in CounselLink and navigate to the Financials tab.
   - Click Budget Period to get to the Budget Overview page.
   - Check the box next to your firm’s name to move the budget to edit mode and then click Edit Amounts.
   - Enter the approximate hours of work which you anticipate will be performed in each stage of the litigation, including expenses.
   - Click Save to return to the Budget Overview page.

Important: You must click Submit for your budget to be sent to UE for approval. The budget is not considered complete until you complete this step.
   - Once you submit your budget, UE will review and either approve or decline it.
   - If UE declines your budget, contact the claims handler to discuss the matter and then you will need to resubmit an updated budget for consideration.
Q: How do I upload invoices to CounselLink?

A: There are two methods of submitting invoices to UE through CounselLink:
- **Upload a LEDES-formatted invoice directly to the claim in CounselLink (preferred method)**
- Email invoices to the CounselLink mailbox (only for law firms that are not capable of creating LEDES invoices)

Q: Why are my invoices being rejected?

A: CounselLink utilizes rules based on UE’s DCG to ensure invoices submitted are compliant. Reasons for rejection could include:
- Incorrect or unapproved rates
- Incorrect invoice format (missing or future dates, timekeepers, task descriptions, billing increments other than .1 of an hour)
- Duplicate invoices or charges
- Missing or exceeded approved budget

Q: There is a rate cap applicable to my matter. How should I submit my invoices?

A: Submit your invoices at the standard rate and UE will adjust the invoices to reflect the agreed rate cap for each timekeeper.

Q: There is a deductible applicable to this matter. Does this have any impact on legal invoicing?

A: No. As outlined in the DCG, you should submit all invoices to UE through CounselLink at the same time a copy is sent directly to the member.

Q: There is a self-insured retention (SIR) applicable to this matter. Where should I send invoices?

A: Continue submitting all invoices directly to UE through CounselLink with a copy to the member. UE must receive all invoices to determine when to begin paying defense costs on our members’ behalf. We are unable to make any payment on a claim without a complete set of legal invoices to reconcile against the limit.

Q: What does UE’s reconciliation process entail?

A: UE reviews our ledger against the firm’s to ensure that the invoices which UE has received exactly match what has been sent to the member. During this process if we find that you have billed the member for disallowed charges, we expect that you will reimburse the member for disallowed charges that were not appealed timely.

Q: What should we do if we receive two payments for the same invoice?

A: To ensure proper credit and for UE to correctly allocate the payment, contact claimsbillinginquiry@ue.org.

Q: How do I appeal an invoice charge that was disallowed?
A: Within 60 days from the date UE completed review of the invoice, submit an email to the Resolutions Analyst identifying each charge in question and the basis for the appeal. Also, within that same time period, discuss the charges in question with the claims handler. If UE allows a charge, the firm should submit a new invoice containing only the charge[s] in question using the original invoice number followed by an “A” indicating the appealed status. 

*Do not bill any disallowed charges back to the member.*

Q: Is there a process for expedited payments?

A: We strive to issue payment within 45 days of receipt of an invoice. If there is an unusual circumstance that you believe requires payment more quickly, contact your assigned claims handler to discuss your request.

Q: If an expedited payment was approved, what additional information is needed?

A: UE issues payments via automated clearinghouse (ACH) or wire transfer. If UE approves your request for expedited payment, please complete the Authorization for Direct Payment form and send it to the claims handler.

Q: Who do I contact if I have additional questions about CounselLink?

A: Call (800) 600-2282 or ask@lexisnexis.com. Please also refer to the Law Firm User Guide.