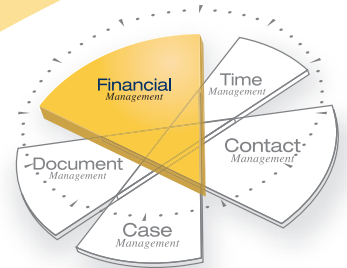




Perceptive Software
Measurable Results

ePrebill Manager Module



Frustrated with a Paper-Driven Prebill Process?

Ready to improve the efficiency of managing prebills? Attorneys and administrators share the pursuit to improve law firm billing efficiency. Many firms hire more staff to solve the problem, and yet the process doesn't get any faster or easier. Sound familiar?

Word processing software made editing a bill easier and more flexible. With the first legal time and billing systems, the prebill took on an added dimension, allowing firms to capture time and expenses within a single system. It allowed one to order, print, and distribute prebills while then permitting a billing administrator to take hand-written changes and enter those into the same system where the data was captured.

Unfortunately, the cycle of generating, distributing and reviewing prebills is still a highly manual, paper-based, slow and tedious process laden with duplicate efforts. For many law firms, prebills still exist as a stack of printed prebills sitting on someone's desk and being passed around from person-to-person.

ePrebill Manager

Orion's ePrebill Manager provides a structured electronic method of distributing prebills for review, editing, markup, one-click acceptance and approvals. It increases visibility into the status of prebill assignment and also reduces paper and printer costs of a paper-driven process. The ePrebill Manager speeds up the firm's billing cycles and increases cash flow by getting bills out sooner. The ePrebill Manager is fully integrated with Orion's desktop application and iOrion, Orion's mobile solution.

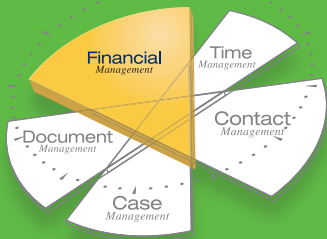
The screenshot displays the Orion ePrebill Manager interface. On the left, a list of prebills is shown with columns for ID, Name, Resp, NEE, Fees, Date, Exps, Alerts, and Deferred. The main window shows a detailed view of a prebill for 'COOKIE FACTORY, THE' with invoice date 9/30/2018. It includes sections for Summary, Fees, Costs & Expenses, Other Accounting, History, Invoice Totals, and Timekeeper Recap. The Timekeeper Recap table shows data for Nancy R. Edwards and Scott Lockwood.

ID	Name	Orig	Original	Billed	Billed	% of
		Hours	Amount	Hours	Amount	Realization
NEE	Nancy R. Edwards	860.90	\$72,180.00	820.00	\$	
SLK	Scott Lockwood	125.80	\$25,940.00	64.00	\$25.48	100.0 % 96.6 %

“Our firm recently began using Orion’s ePrebill Manager, and we couldn’t be happier. Within the first day our attorneys noted the time it saves them, the ease of use, and convenience it provides. We no longer face dealing with illegible handwriting, there is less time spent editing entries and our attorneys are able to see, in real-time, the effect write-downs and billing adjustments have on the final invoice. Orion’s ePrebill Manager has helped speed-up our billing process and modernize our operations”

Greg Miskulin
Executive Director
Dowling Aaron Inc.

Orion's ePrebill Manager offers a cleanly presented design, mirroring the traditional prebill layout. This format allows for a smooth transition to handling prebills electronically while also offering much greater productivity and collaboration.



Easily Identify Edits, Tracking the Financial Impact of Write-Downs

A paper-driven approach to prebill review provides little visibility into the financial impact of write-downs. This means neither the attorney nor the billing administrator can see how these adjustments will affect both the client and the working attorney's billing realization rates. Paper-based prebilling also lacks a clear audit trail showing who made what changes, when and why. Without an audit trail, how can a lawyer justify an invoice when a client questions the charges, possibly weeks or months after the prebill was created? Lawyers and legal staff need an audit trail to provide key billing insights.

Orion's ePrebill shows edits from all participants. Attorneys can view annotations by individual, then filter what's displayed to only include prebills that were edited. Since Orion's ePrebill tracks all edits as annotations, the original information is maintained so any change can be rolled-back or applied by the billing administrator with a single click. As adjustments to the value of a Fee, Cost or Expense are made, the attorney can assess the cumulative effect of these write-downs.

Adjustment Reason: **TRVL Travel Time**

Travel Time - 50% reduction

Bill #	Date	ID	Description	Orig Hrs	Rate	Bill Amt	Charge Matter
44059	12/06/2017	NEE	Attended deposition of Joe Smith	3.00	\$300.00	\$900.00	
44059	12/06/2017	NEE	OK TRAVEL - 50% Red - OK for 1.50 hrs. Chicago, IL to ATL-Atlanta, GA	3.00	\$300.00	\$900.00	
44059	12/07/2017	NEE	Meeting with board members regarding possible	3.00	\$300.00	\$900.00	
44059	12/07/2017	NEE	OK TRAVEL - 50% Red - OK for 1.50 hrs. IL to meet with	3.00	\$300.00	\$900.00	
44059	12/08/2017	NEE	Travel to Birmingham, AL for Deposition	3.00	\$300.00	\$900.00	
44059	12/08/2017	NEE	Deposition of Jane Doe	3.00	\$300.00	\$900.00	
44059	12/13/2017	NEE	Attended deposition of Mary Jane Watson	3.00	\$300.00	\$900.00	
44059	12/13/2017	NEE	Travel from Savannah, GA to ATL-Atlanta	3.00	\$300.00	\$900.00	
44059	12/13/2017	NEE	Interview with Experts and Witnesses	3.00	\$300.00	\$900.00	
44059	12/14/2017	NEE	Deposition of Mike Smith	3.00	\$300.00	\$900.00	
44059	12/14/2017	NEE	OK TRAVEL - 50% Red - Washington, PA to DC, VA to ATL	3.00	\$300.00	\$900.00	
44059	12/14/2017	NEE	Pre-trial conference with litigation team	2.00	\$200.00	\$400.00	
44059	04/05/2018	NEE	OK TRAVEL - 50% Red - Baltimore, MD to DC - depositions, OK of	2.00	\$200.00	\$400.00	001544-000002
44059	04/13/2018	NEE	Email to opposing counsel re hearing	0.30	\$30.00	\$9.00	
44059	04/13/2018	NEE	Prepared and drafted a document for client approval and submitted same to the court for signature	1.00	\$100.00	\$100.00	
44059	04/24/2018	NEE	Travel from ATL-Atlanta to Savannah, GA	3.00	\$300.00	\$900.00	
44059	07/13/2018	NEE	Draft & File Pleadings/Documents draft pleading	2.30	\$230.00	\$529.00	001544-000002
44059	07/13/2018	NEE	Let's note mail for arbitrator letting her know that we've settled issues 1-4 on the arbitration complaint	0.30	\$30.00	\$9.00	
44059	08/24/2018	NEE	Prepared and drafted a motion for summary judgment in the presence of the client	1.00	\$100.00	\$200.00	

Edits are easily shown in red text or strike-throughs. Additional instructions for the billing manager and/or reasons for making value changes can be provided on a transaction-by-transaction basis for reporting purposes.

Orion's ePrebill Manager Features Include:

- **Enhance Billing Cycles through Workflow Management** – Routing & Distributing of Prebills Digitally
- **Intuitive Design** – Mirrors Traditional Prebills, Easing the Transition to Electronic Edits
- **Highly Collaborative** – ePrebills are Routed Electronically for Review and Editing
- **Identify Bottlenecks** – Increased Visibility into the Status of Prebill Assignments
- **Reduction of Errors** – Online Edits Remove Duplicate Data Entry and Transcription Errors
- **Increased Cash Flow** – Improved Real-Time Discernibility of Write-Downs and Adjustments
- **Lower Overhead Costs** – Decrease Paper Usage, Reduce Printing Costs and Lower Overall Administrative Costs

Invoice Summary:

For Invoice Date: 8/5/2018

001544-000002: The Cookie Factory

4536 Chamblis Dunwoody Road
Suite 221
Atlanta, GA 30338

Matter Name: Cookie Factory v. Kater's Bakery

Originating: NEE - Edwards, Nancy E.
Responsible: NEE - Edwards, Nancy E.
Managing: NEE - Edwards, Nancy E.
Project Manager: NEE - Edwards, Nancy E.

Invoice Style: 01 - Hourly, Rate, Amount with Full Person Recap

Billing Notes: Be sure to have KCH review all invoices after NEE; client won't pay for photocopies, postage or faxes; apply discount before invoicing

Other Accounting:

Current	Amount	Last Billing of Matter	Amount
81.00	\$81.00	8/3/2018	\$81.00
35.40	\$35.40	10/29/2018	\$35.40
11.50	\$11.50	Payment Amount	\$11.50
11.10	\$11.10	Selected Total	\$11,977.00
121.4	\$121.4	Cost & Expenses Billed/Paid to Date	\$960.38
AR Balance	\$232.21	Credits & WFO Fees/Expenses	\$70.50

Invoice Totals:

	Orig Amt	Bill Amt
Balance Forward	\$112.12	\$112.22
Selected Fees	\$103,405.00	\$120,760.00
Selected Cost & Expenses	\$1,286.00	\$1,096.00
Selected Totals	\$104,803.12	\$121,868.22
Less Payments & Credits	\$10,181.65	\$10,181.65
Invoice Totals	\$94,621.47	\$111,686.57

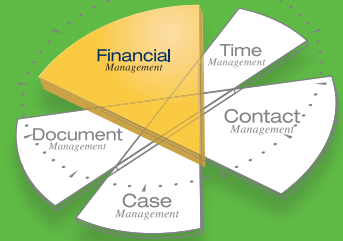
Timekeeper Recap:

ID	Name	Original	Edited	Billed	Bill Amt	% of Total	Realized %
NEE	Nancy E. Edwards	965.90	472,180.00	328.00	\$48,000.00	51.9%	88.7%
LLA	Lauren L. Applebee	189.70	174,000.00	133.00	\$18,000.00	21.7%	73.6%
SIL	Scott. Lockheed	129.80	\$25,960.00	64.00	\$9,000.00	12.4%	49.3%

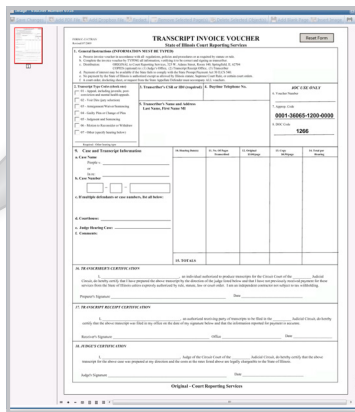
For Fees, the net change is easily viewable. As the realization for each working timekeeper approaches key thresholds, color-coding helps the attorney make important decisions by showing the effects write-downs have on the invoice before it's actually generated.

Effortlessly Identify Missing Images from Reimbursement Requests

Keeping paper-based copies of A/P vendor invoices and attorney/staff reimbursement requests is both inefficient and highly expensive due to storage costs. Law firms can use Orion to digitize invoices and receipts, linking them directly to associated costs, so they can be included along with the Client's invoices. Through seamless integration with Orion's Imaging Module, Orion's Reimbursement Manager Module and iOrion allow attorneys and billing managers to identify what receipts are missing. Additionally, when reviewing costs that seem unusual via Orion's ePrebill Manager, attorneys can preview the invoice/receipt associated with those costs, accelerating a process which is often ineffective and cumbersome.



Receipt #	Code	Description	Only Amt	Chg	Change Text
012520008	FRM	Federal Express - Overnight Delivery of Signed Contracts (8437)	\$50.00		
4724	CACOUR		\$50.00		
012520008	FRM	Federal Express - Overnight Delivery - Courier-Signed Contracts (8438)	\$50.00		
4744	CACOUR		\$50.00		
012720008	FRM	Federal Express - Overnight Delivery - Deposition Transcripts (8439)	\$100.00		
4743	CACOUR		\$100.00		
012720008	FRM	Federal Express - Overnight Delivery - Copy of Exhibits (8443)	\$70.00		
4738	CACOUR		\$70.00		
012620009	FRM	Court Reporter Fees (8470)	\$50.00		
4797	CACR		\$50.00		
012620009	FRM	Photocopy Charges	\$1.00		
4797	EX23		\$1.00		
012620009	FRM	Widlaw On-line Research	\$20.00		
4797	EX23		\$20.00		
012620011	FRM	Photocopy Charges	\$2.00		
4798	EX23C		\$2.00		
022120113	FRM	Pulaski Co. Court - Filing Fee (8484)	\$500.00		
4799	CAP		\$500.00		
012620113	FRM	Court Reporter Fees (8485)	\$120.00		
4799	CAP		\$120.00		
012620113	FRM	Photocopy Charges	\$12.00		
4799	EX23		\$12.00		
012620113	FRM	Federal Express - Overnight Delivery of Contracts (8489)	\$200.00		
4715	CACOUR		\$200.00		
012620117	FRM	Court Reporter Fees (8518)	\$75.00		
4770	CACR		\$75.00		



Orion ePrebill Manager provides clearly visible warnings when a "Cost Validation Image" is missing; the program also gives attorneys the option to preview A/P vendor invoices or receipts for attorney/staff reimbursement requests.

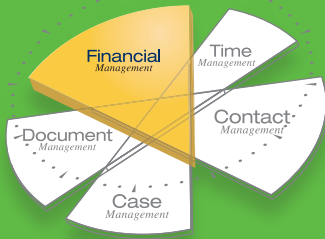
Online Edits Reduce Duplicate Data Entry & Transcription Errors

Distributing, reviewing and editing printed prebills is a highly manual, slow and tedious process. For many law firms, these prebills are marked-up by hand. Further, once a printed prebill is returned to the billing administrator or legal assistant, the recipients frequently struggle to read illegible handwriting, even when keying the attorney's edits into the billing system.

Unlike many third-party solutions, Orion offers a tightly integrated, streamlined solution that offers both electronic workflow and seamless integration with Orion's Prebill Manager, a tool designed to help the billing administrators effectively manage the prebill editing process. Attorneys' annotations can be reviewed and applied (or not) at the click of a button, thus eliminating time-consuming edits and also reducing transcription errors.

Record	Date	Time	Original Amount	Rate	Bill Rate	Bill Time	Bill Amount	Bill	Annotations
64402	12/10/2017	NEE	1.00	\$100.00	200.00	1.00	\$100.00		
64404	12/14/2017	NEE	4.00	\$800.00	200.00	4.00	\$800.00		
64406	12/14/2017	NEE	2.00	\$400.00	2.00	2.00	\$400.00		
64403	04/02/2018	NEE	2.00	\$400.00	200.00	2.00	\$400.00		
64444	7/16/2018	NEE	0.20	\$400.00	200.00	0.20	\$400.00		
64442	7/16/2018	NEE	2.50	\$2,000.00	800.00	2.50	\$2,000.00		

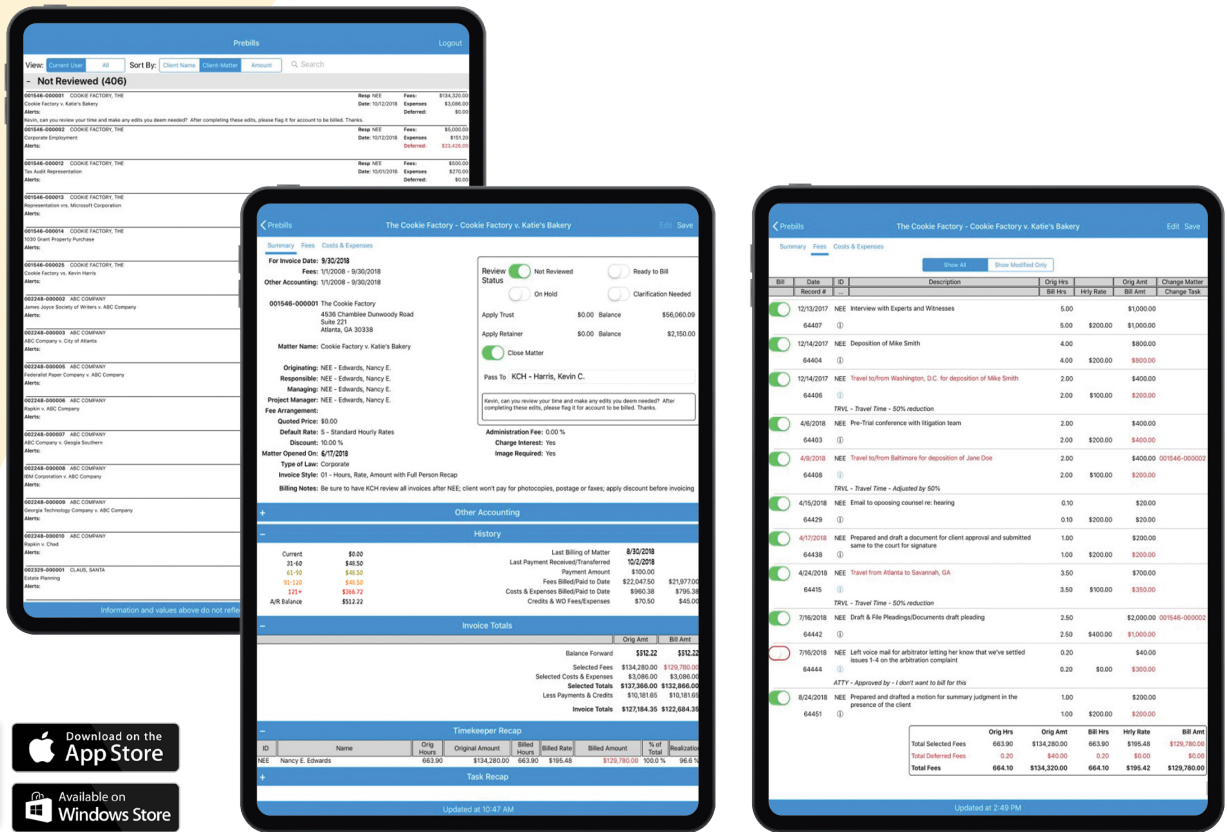
Edits made by the attorneys are tracked as annotations, providing the billing administrator complete control. Since Orion maintains the original information separately from these annotations, changes can be easily applied or reversed by the billing administrator at the click of a button.



Review Prebills On-The-Go

A paper-driven prebill process typically requires attorneys to review and hand-write edits when they're away from the office. Orion understands the needs of modern attorneys, so Orion's ePrebill Manager is available both via the desktop application and on a tablet. This allows attorneys to use mobile features that provide the same depth of functionality they've come to expect from the desktop via iOrion. The point of mobility isn't just to provide access to do some things outside the office; it is to allow attorneys to be more productive while away from their desktops.

With iOrion, in addition to all of the tools they've come to appreciate using via their mobile devices, attorneys are now able to review and edit prebills on a tablet rather than printing stacks of paper and having to carry them around during the prebill process. Orion's intuitive design simulates the appearance of a traditional prebill, smoothing the transition to the paperless prebill. Attorneys can work with the same information they already know but at a much higher level of productivity and collaboration.



Blending the trusted reliability of Orion's Desktop application with the innovative and intuitive user experience found in Orion's mobile application, iOrion, Orion's ePrebill Manager app provides a full-featured solution for attorneys that find themselves on-the-road or simply prefer a tablet version rather than the Desktop application.

For more information about Orion's ePrebill Manager or other products visit www.orionlaw.com or email info@orionlaw.com.

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