Legal Aid Ontario

Viewing upcoming billing deadlines in *Legal Aid Online*

Legal Aid Ontario Job Aid

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For more information

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Viewing upcoming billing deadlines on *Legal Aid Online*

1. Background

In early 2012, Legal Aid Ontario opened *Legal Aid Online* to accept accounts that were submitted after the billing deadline. On average, approximately 20 per cent of accounts that require review are late. The volume of late accounts in the past 16 months has ranged from 460 to 1060.

Accounts that are not submitted by the billing deadline are not subject to automatic payment and must be assessed by staff in Lawyer Services & Payments (LSP): first to determine if an extension should be approved, and then to settle the account. This creates delays in payment and in processing other accounts. As often the reason for missing a billing deadline does not warrant discretion, many of these accounts are not paid

To help lawyers with meeting their billing deadlines, LAO is introducing a billing reminder report on *Legal Aid Online*. This report lists the billing deadlines and provides a "countdown" of accounts due in 90 days of less.

This document provides instructions on how to view your the report and how to submit accounts that are approaching the billing deadline on time.

For more information on billing deadlines
visit: www.legalaid.on.ca/en/info/billing_deadlines.asp

1.1 Introduction

This enhancement to *Legal Aid Online*

- provides lawyers with a report with upcoming billing deadlines
- provides immediate access to accounts approaching the billing deadline within 90 days.
- will help reduce or eliminate the number of missed deadlines
- helps to support timely account payment.

The billing reminder report will be updated on the first Sunday of every month with all accounts that are approaching a billing deadline of 90 days or less.

Important

To ensure your account is not late billed, within six months of the one-year anniversary date of the certificate, you must submit an interim or final account for all fees and disbursements incurred within each 12-month period of the certificate.

2. Viewing upcoming billing deadlines

If you have any upcoming billing deadlines, you will receive a notice after you have logged onto *Legal Aid Online*(highlighted in Figure 1).

1. **Read the notice.** Select "OK" to acknowledge that you have received and read and received the notice. This message will not appear again until the next month.

Figure 1: Late billing deadline notice

Note: The system will refresh the list of certificate on the first Sunday of every month.

To view the list of accounts due within 90 days, follow this simple process:

1. Click on the "View Upcoming Billing Deadlines" link under the "Criminal" or "Civil Account" heading (highlighted in Figure 2 below).

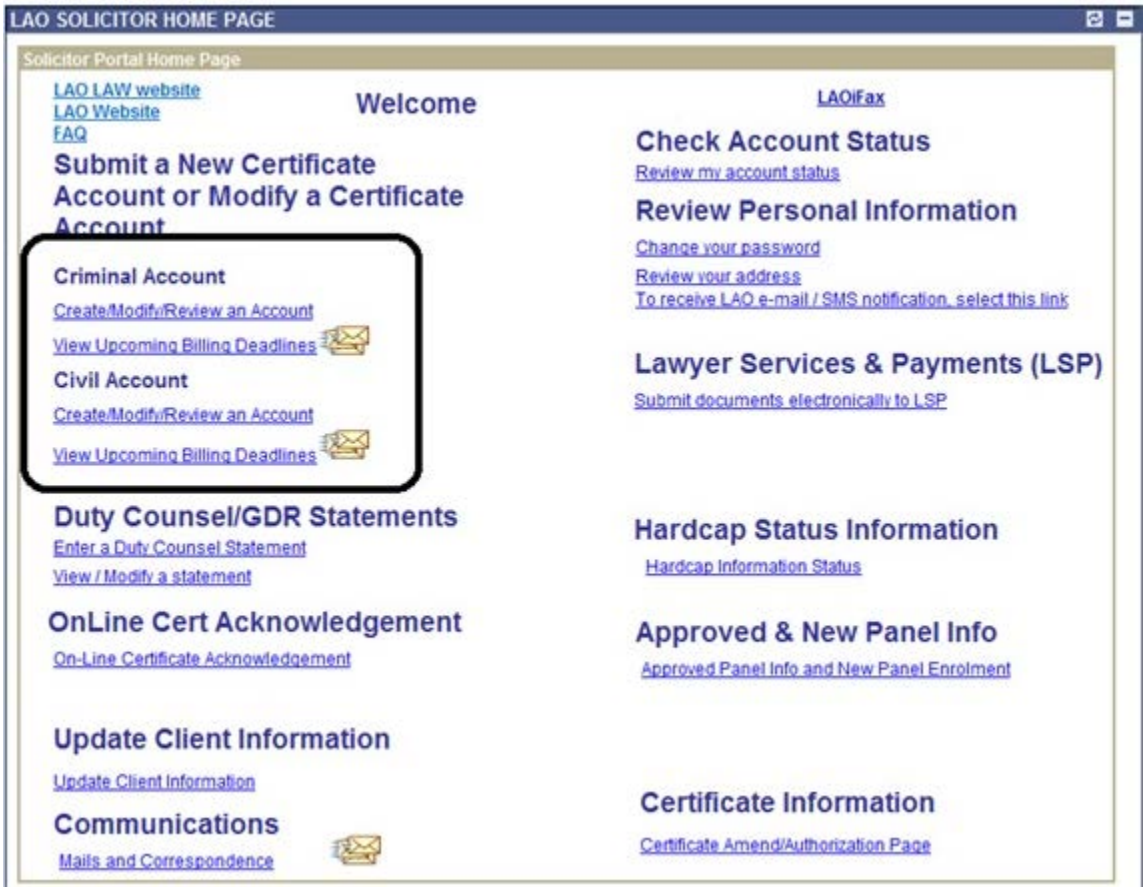

Figure 2: View upcoming billing deadline link

Note: An envelope indicates that you have one or more accounts approaching the billing deadline. These could be either civil or criminal. Both links direct you to the same list.

2. Place your cursor over the envelope icon to see how many accounts are on the list (highlighted in Figure 3 below).

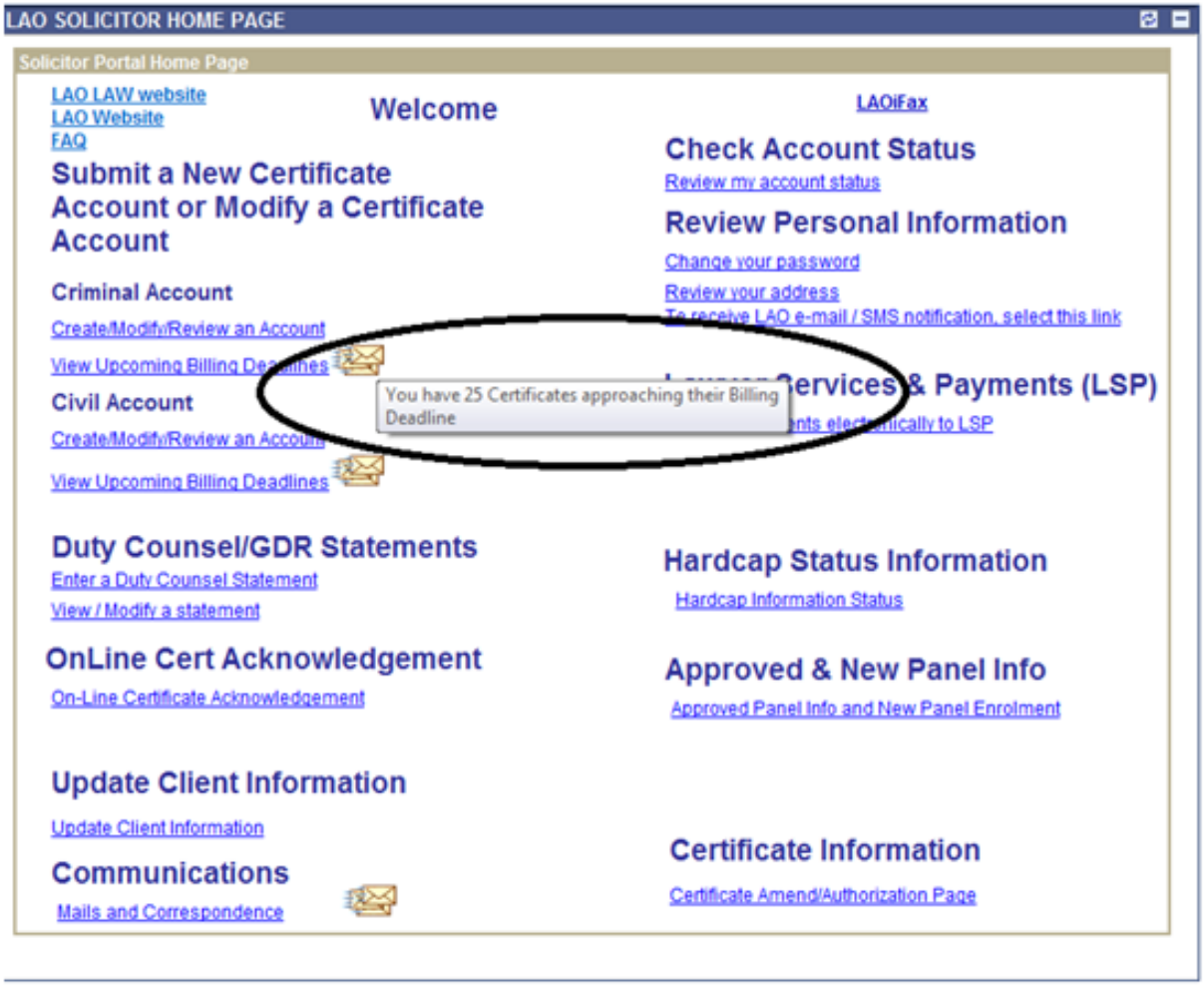

Figure 3: How many accounts are on the list

Note: The envelope icon will appear beside both civil and criminal accounts regardless of which type of certificate is approaching its billing deadline.

3. Select the "View Upcoming Billing Deadlines" link to see the accounts approachingthe billing deadline. You will be directed to a list all certificates with an upcoming billing deadline. The upcoming billing deadline list is sorted by days remaining. Any certificates due in the next 30 days are marked in red. This list will be updated daily with the days remaining counting down until it reaches "0" (highlighted in Figure 4 below).

   Note: The list of certificates will not be refreshed until the following month. Only the number of days remaining will be updated daily. The last account date will be updated as soon as an account is submitted for this certificate.

Billing Deadlines

Certificate Billing Deadlines

October 30, 2013

Language/Langue ENGLISH

Certificate Number CE

Search Clear

Certificate Information

Customize | Find | View All | First 1-25 of 25 Last

	Certificate	Type	Client	Certificate Issue Date	Anniversary Date	Deadline Date	Billing Anniversary	Last Account Date	Days Remaining
1	CE5555555	CRIM	Last name, First name	04/03/2012	04/03/2013	10/03/2013	1		0
2	CE5555555	CRIM	Last name, First name	04/03/2012	04/03/2013	10/03/2013	1	07/02/2013	0
3	CE5555555	CRIM	Last name, First name	05/10/2012	05/10/2013	11/10/2013	1		9
4	CE5555555	CRIM	Last name, First name	05/15/2012	05/15/2013	11/15/2013	1		14
5	CE5555555	CRIM	Last name, First name	05/18/2012	05/18/2013	11/18/2013	1		17
6	CE5555555	CRIM	Last name, First name	05/28/2012	05/28/2013	11/28/2013	1		27
7	CE5555555	CRIM	Last name, First name	06/01/2009	06/01/2013	12/01/2013	4	09/17/2009	30
8	CE5555555	CRIM	Last name, First name	06/01/2011	06/01/2013	12/01/2013	2		30
9	CE5555555	CRIM	Last name, First name	06/13/2012	06/13/2013	12/13/2013	1		42
10	CE5555555	CRIM	Last name, First name	06/14/2011	06/14/2013	12/14/2013	2		43
11	CE5555555	CRIM	Last name, First name	06/19/2012	06/19/2013	12/19/2013	1		48
12	CE5555555	CRIM	Last name, First name	06/19/2012	06/19/2013	12/19/2013	1		48
13	CE5555555	CRIM	Last name, First name	06/20/2011	06/20/2013	12/20/2013	2	08/20/2012	49
14	CE5555555	CRIM	Last name, First name	06/20/2012	06/20/2013	12/20/2013	1		49
15	CE5555555	CRIM	Last name, First name	06/22/2012	06/22/2013	12/22/2013	1		51
16	CE5555555	CRIM	Last name, First name	06/28/2012	06/28/2013	12/28/2013	1	06/10/2013	57
17	CE5555555	CRIM	Last name, First name	07/03/2012	07/03/2013	01/03/2014	1		63
18	CE5555555	CRIM	Last name, First name	07/06/2011	07/06/2013	01/06/2014	2		66
19	CE5555555	CRIM	Last name, First name	07/07/2011	07/07/2013	01/07/2014	2		67
20	CE5555555	CRIM	Last name, First name	07/07/2011	07/07/2013	01/07/2014	2		67
21	CE5555555	CRIM	Last name, First name	07/09/2012	07/09/2013	01/09/2014	1		69
22	CE5555555	CRIM	Last name, First name	07/11/2011	07/11/2013	01/11/2014	2		71
23	CE5555555	CRIM	Last name, First name	07/12/2011	07/12/2013	01/12/2014	2	06/06/2013	72
24	CE5555555	CRIM	Last name, First name	07/17/2012	07/17/2013	01/17/2014	1		77
25	CE5555555	CRIM	Last name, First name	07/27/2011	07/27/2013	01/27/2014	2		87

Figure 4: Accounts approaching the billing deadline

4. Columns can be sorted by ascending or descending order by selecting the column heading.

Column Legend:

- Days Remaining - Indicates how many days there are before the account is late. Accounts that are 30 days or less will be highlighted in "red". Only accounts that have 90 days or less will be listed. If the number of days for an account reaches zero, it remains on your list until the end of the month , the account will not be carried over on to the next month's list.
- Certificate – Certificate number
- Type – Criminal or civil matter
- Client – Client name
- Certificate issue date – Date the certificate was issued
- Anniversary Date – Anniversary date for the certificate
- Deadline Date – Deadline date that an account has to be submitted by
- Billing Anniversary – Indicates which year the certificate anniversary is in
- Last Account Date – Date that an account was last submitted on this certificate.
- Days Remaining – Amount of days remaining until the account is late

Tips

To sort your list by any column, simply click on the column heading.

Important

The certificate will continue to appear on the list even if you submit an interim account for the anniversary period. Only the submission of a final bill will remove the item from your list.

If you have submitted an account, ensure that all work done up to the Anniversary year has been sent. All work completed within the Anniversary has to be submitted within six months of the anniversary date regardless of how many accounts have been submitted.

For example: If a certificate was issued on, June 15th, 2012, all work done between June 15th, 2012 and June 14th, 2013 must be submitted no later than December 15th, 2013.

The billing deadline refers to the services provided within the anniversary date. Submitting an account each year does not met the billing deadline requirements if all services for that billing period have not been billed.

An account is not late if the services for all fees and disbursements incurred during the first 12 months are billed before the anniversary date. You can submit accounts at any time before the billing deadline.

3. How to bill an account

1. To bill an account on the list, select the certificate number on the list. A new page will open up with the certificate number populated in the "Certificate #:" field.

2. Select "Add" (highlighted in Figure 5 below). You will be taken directly to the account billing page and you will be able to bill your account as usual.

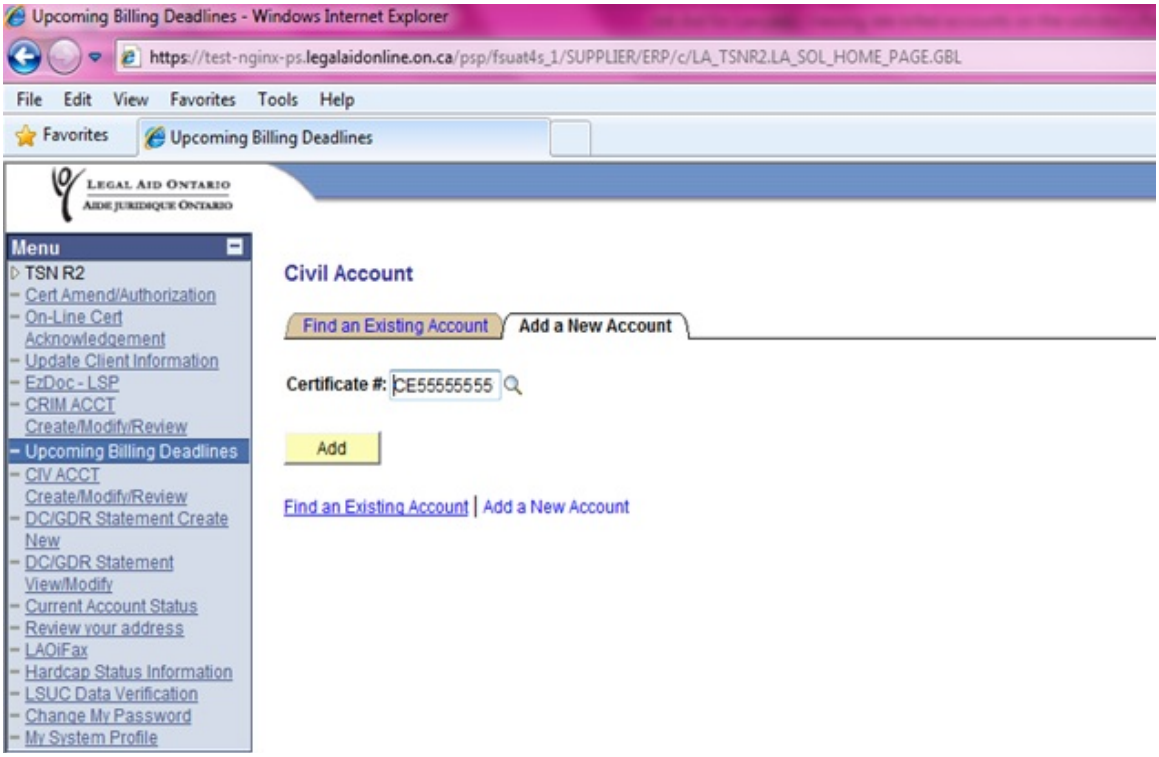

Figure 5: Select 'Add' to go to the account billing page

If you are billing for services in the previous anniversary year and the certificate has reached "0 days", the billing deadline has passed. When submitting an account for these services, please include a reason explaining why you were unable to bill the account within the billing deadline. After you submit the account, a message confirming that the account is late billed will appear (highlighted in Figure 6 below).

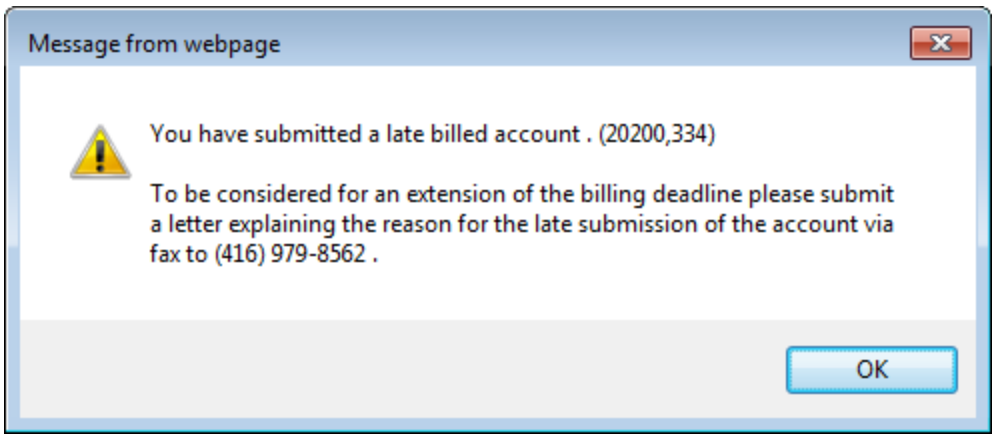

Figure 6: Message confirming the account is late billed

If you did not attach a reason before submitting the account, you can do so by using the "Send Documents Electronically" link on the main page on *Legal Aid Online*.

4. Additional Billing Information

4.1 Final accounts

- **If the case is completed within 12 months**, your final account and any supplementary accounts must be received no later than six months after the one year anniversary date of the certificate.

- **If you have submitted a final account**, any fees or disbursements you may have overlooked must be billed no later than six months after the one year anniversary date of the certificate.

4.2 Interim accounts

- **If the case is not completed within 12 months**, you must submit an interim account for all fees and disbursements incurred during the first 12 months. This account must be received no later than six months after the one year anniversary date of the certificate.

- **If you have submitted an interim account**, you must ensure that any additional unbilled fees and disbursements incurred during the first 12 months are billed no later than six months after the one year anniversary date of the certificate.

- Do not resubmit or re-bill any work or disbursements previously billed, and only bill any additional work or disbursements incurred up to or after the end of the 12 month period.

- For all work completed within each subsequent 12-month period after the first period, further interim or final accounts must be submitted within six months of each subsequent anniversary.

Before each billing deadline, you must ensure that you have billed for all work and disbursements incurred during the entire 12-month period.

You can submit accounts at any time before the billing deadline. However, you must make sure to bill all additional fees and disbursements incurred after the first interim account was submitted and up to the certificate anniversary date. These accounts must be received within six months of the anniversary date.

4.3 Late accounts

Accounts that are not received by the billing deadlines are not eligible for payment. In exceptional circumstances where an account has been submitted beyond the billing deadline,

you may submit a formal request for an extension of time. Inadvertence or administrative difficulties may not be considered as exceptional circumstances for the basis for discretion.

If the services or disbursements need to be billed to comply with the billing deadline rules, LAO will accept accounts for less than the normal minimums of $500 in fees and/or $50 in disbursements.

For more information on billing deadlines contact the Lawyer Service Centre.