eBilling Hub

DISCOVERY USER RESEARCH
INVOICE ENTRY FINDINGS

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User Experience

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eBilling HUB – PROJECT LIVEWIRE

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Research High Level Findings

Six (6) Participants

- One (1) eBilling Supervisor
- Two (2) Electronic Billing Analysts
- One (1) Client Billing Liaison
- One (1) Billing Manager
- One (1) Director of Finance

Research:

- One (1) hour phone interviews using webex for audio and video
  - Recordings Available Upon Request

Tasks:

- Thirteen (13) qualitative questions,
- One (1) quantitative question, and
- Open discussions

QUANTITATIVE RESULT:

eBH INVOICE EDITOR USER EXPERIENCE

3.33 out of 5

1 being completely unsatisfied,
3 being average, and
5 being truly exceptional

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System Usability Score (SUS)

The National Average of a SUS is 65

eBH SUS SCORED

44.58

(Well Below the Average)

Individual scores from the Six (6) participants:

- 32.5
- 40
- 50
- 52.5
- 40
- 52.5

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User's Quotes

*"It's a very expensive piece of software: it should be a 4-5 star performing product instead of a 3-4 star product. This is our primary tool used to **bill and collect.**"*

"My needs are more about running reports, reporting and getting information out of the system and making sure my team's job is as good as it can be."

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User's Quotes

"My team didn't know they needed to go into Time Metric and review after submission, accept the appeal and allow the bill to be processed! Submitting the bills is working – but it doesn't guide us in getting that bill approved and paid at a high realization as possible."

" I just use statuses and reporting."

"eBH is very smooth with dealing with submissions. But submitting the bills is only the first step of getting the bill paid."

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Popular Vendors

Most Clients are using between 15-40 different Vendors

1. Legal Tracker
2. Collaborati – Most friendly for firms gives them the most information. Does not have as many requirements to follow for example, on the matter, etc.
3. Tymetrix 360
4. Allegient
5. Council Link
6. ADP
7. Ariba
8. Matter Management
9. Law Tracker

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Emergent Themes

VALIDATION ERRORS

- Multiple Matters display on the validation screen, but not on the original editor screen.
- Fees with validation errors are indicated but it doesn't show where the error is specifically.
- Detail on validation is more descriptive, than internal page.
- eBH errors are more explicit than some of the vendors. Positive, but we can improve this further with an audit of all error validation messages. To allow User quick error recovery.
- Audit all errors and ensure they speak the Users' language and are clickable or in close proximity to the error that needs corrected.
- For example, "Unable to determine if this an acceptable rate" timekeeper message – this isn't very descriptive. Unclear how to recover from this error.
- Errors are on a separate screen from where they need to be corrected. Need to flip back and forth for correction.
- Usea don't use the editor if they don't have any errors notated to fix.

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Emergent Themes

DELAY OF INVOICE

- We can't allow invoices to sit too long we need reminders prior to 60 days and more communication to know if it has been paid. Sometimes depending on the vendor bills sit and eBH's status is not updated. This forces us to spend a lot of time outside eBH , logging into all of the other Vendor sites to identify where the bill is in the process of getting paid.
- Status disparity between eBH and Vendors. eBH will say status= ebilled, but Counsellink says there are 5 issues currently. This disparity between when a status is updated in the vendor site and when EBH displays it IS frustrating.

DIFFERENT USE CASES FOR INVOICE ENTRY

- Some Clients use hub for the final invoice- option to bill from proforma or final invoice (we finalize before submission). Once it's in the billing wizard it is final we just look it up in the billing system– the only types of edits we would make would be blocked billing, task or expense code that needed to be changed.

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Emergent Themes

MOVING ADVANCED FEATURES

- Some of the features in advanced are frequently used, but are tucked several clicks away in the Advanced Feature that launches another popup. At this time in the workflow 2 popups are launched.

PASSWORD

- Special Characters are not accepted and I like to use them.
- Expired passwords are a problem. They seem to happen a lot and users don’t see it coming.

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Emergent Themes

REPORTING

- Not useful
- Run reports on eBH on the intelligence goals last review period to improve our scores on eBH to get our numbers up.
- The reports are not extremely helpful.
- We have to submit so many of our invoices outside of eBH – it is impossible to get proper reporting.
- Would love custom dashboard per persona – displaying most frequently used, rather than hunting for them each time –only runs once a month – can forget.

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Emergent Themes

USABILITY

- Too much scrolling
- Searching/not intuitive design
- Wasting time on task
- Font/Visual Design
- Side by side tables
- On search have cursor already in field instead of clicking to it.
- Icons were used multiple times in different ways
- Helpful if display Count of Matters and invoices
- Users create workarounds – making it more challenging to train new people on how to use the solution.
- Descriptions should wrap
- Users like Replace feature, but didn't know it existed. Refine labeling and usability to act like word.
- Select using click ctrl shift to select in between/Need Usable data grid.
- Ability to click on the Vendor on the right and it would take user to the vendor site.

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Emergent Themes

INVOICE ENTRY

- Invoice Number field should be disabled so users especially new ones do not modify.
- Add POSTFIX NUMBER on the main screen in addition to the original number.
- Add on first summary page how many matters are on the invoice.

EDITING

- Editing multiple invoices in a batch process is very cumbersome. Analysts prefer to process one invoice at a time to reduce human error on their part. This needs to be easier.

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Emergent Themes with Competitor's Take

VENDOR SPECIFIC

- In some Vendor systems (Collaborati) user can see Timekeepers that are authorized by the client vs. some of the other systems do not allow user to put the timekeepers in or see who is approved. Like to see Timekeepers
- Inconsistencies between vendors. Eventually perhaps the vendors could 'Talk' to eBH. To alleviate the multiple logins.
- Using Legal Exchange, it's not possible to carry over a bill as a final bill from eBH (If we have it marked as a final bill in EBH, user still needs to manually go to the Legal Exchange site and check box for final bill- outside work).
- When you repost an invoice using Serengeti, they posts a Comment rather than rejecting. If they reject then you have to submit a new one. If they just make a comment then you have the opportunity to repost. Hub treats as a new invoice – revised invoice needs a unique invoice number. Hub should treat this as a new one.
- The system is lacking in certain areas – that is why we can't ebill everything. For example, there are certain clients that are using vendors, so we can not auto submit to.

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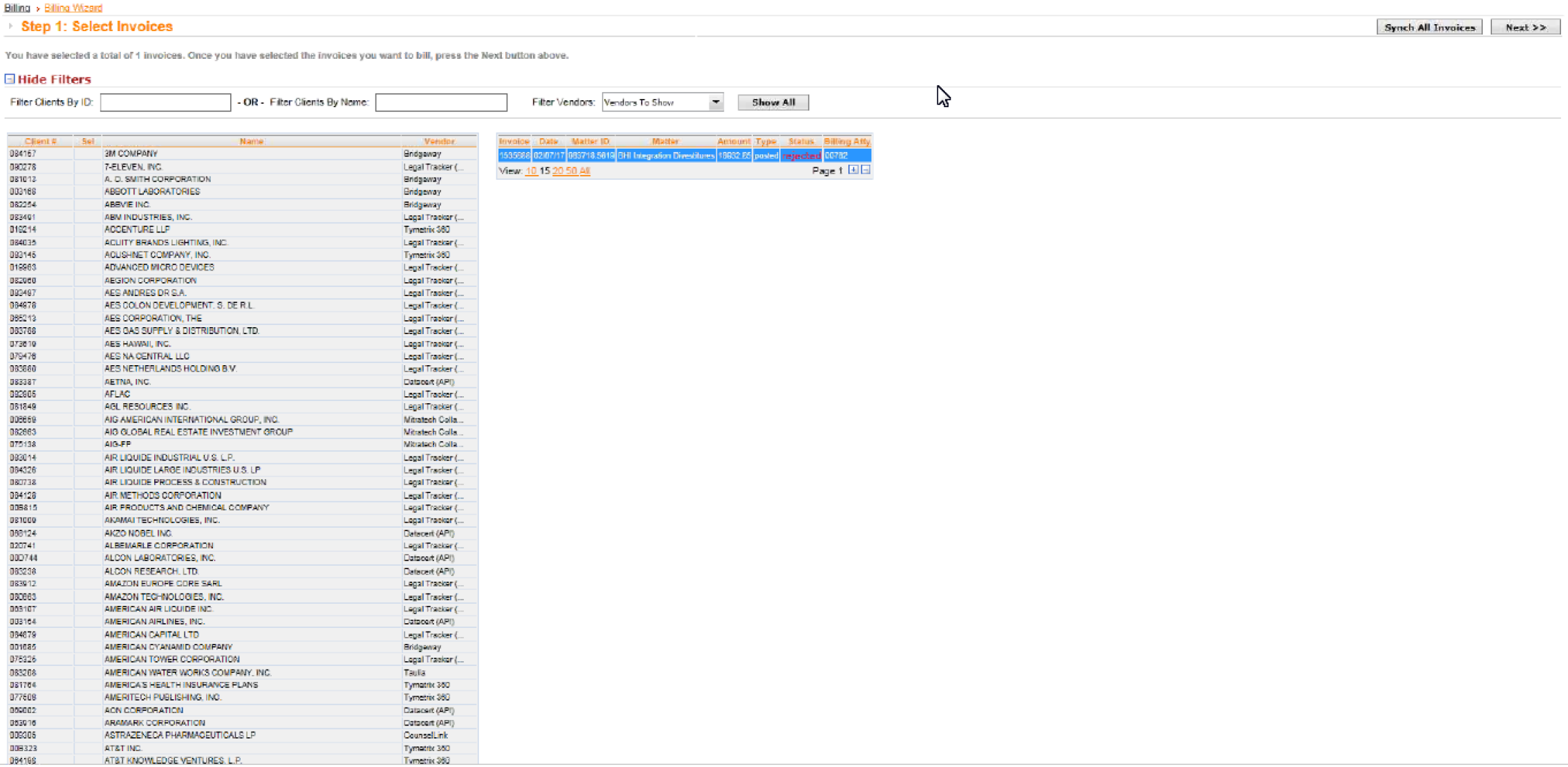
Current Invoice Editor Interface



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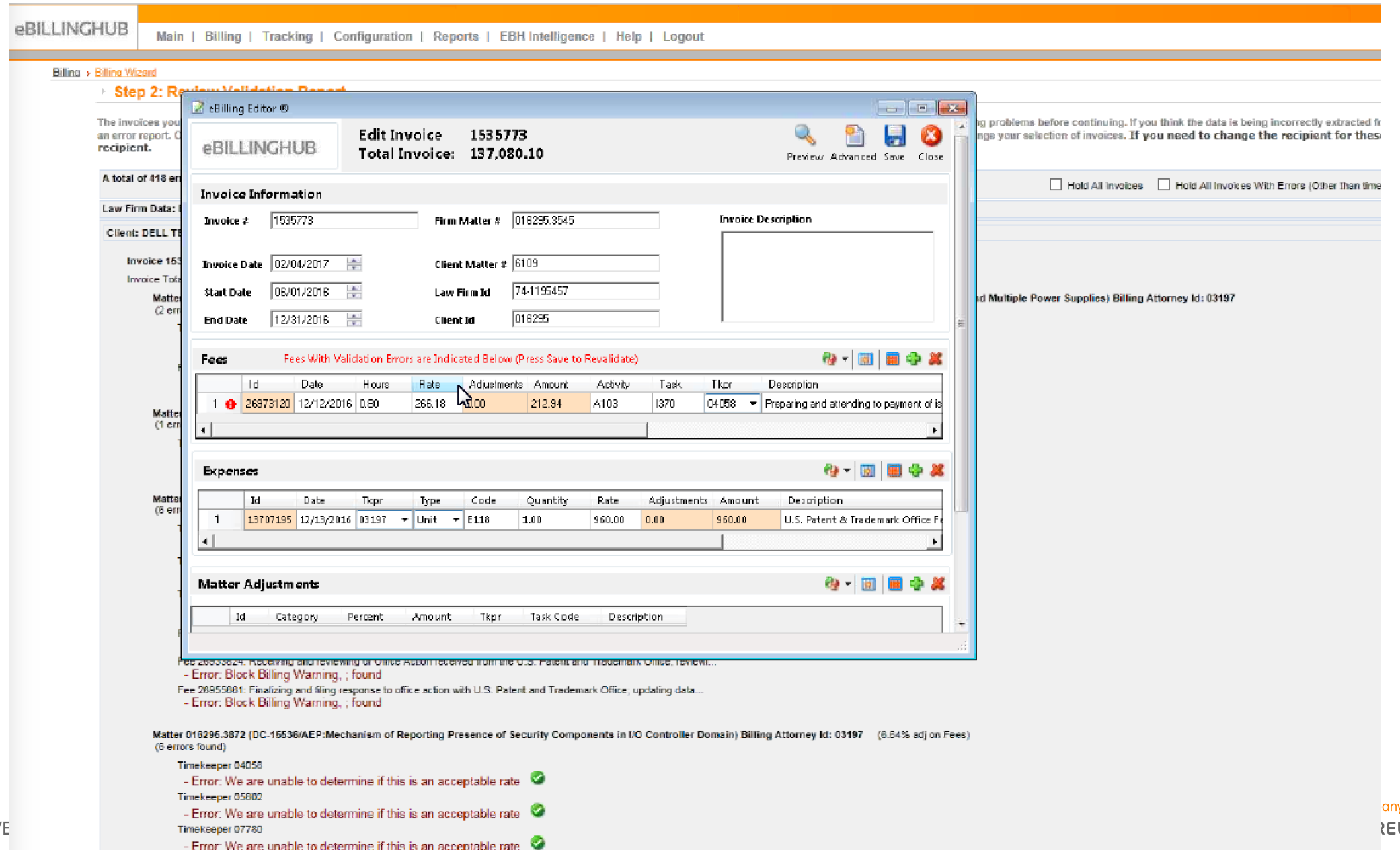
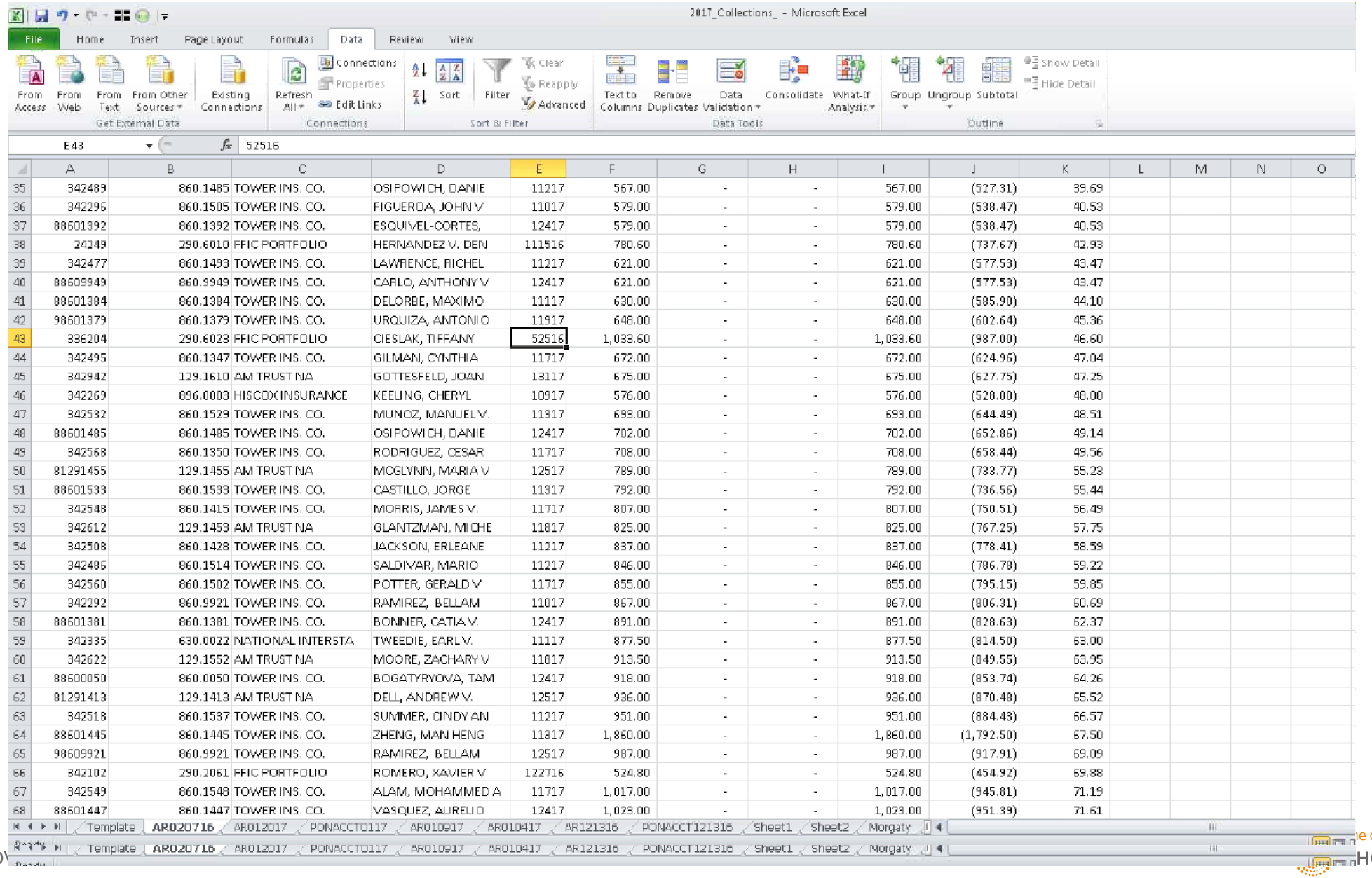
Current Invoice Editor Interface



Using Excel Manage Work Outside of the System



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
35	342489	860.1485	TOWER INS. CO.	OSIPOWICH, DANIE	11217	567.00	-	-	567.00	(527.31)	39.69				
36	342296	860.1505	TOWER INS. CO.	FIGUEROA, JOHN V	11017	579.00	-	-	579.00	(538.47)	40.53				
37	88601392	860.1392	TOWER INS. CO.	ESQUIVEL-CORTES,	12417	579.00	-	-	579.00	(538.47)	40.53				
38	24249	290.6010	FFIC PORTFOLIO	HERNANDEZ V. DEN	111516	780.60	-	-	780.60	(737.67)	42.93				
39	342477	860.1493	TOWER INS. CO.	LAWRENCE, RICHEL	11217	621.00	-	-	621.00	(577.53)	43.47				
40	88609949	860.9949	TOWER INS. CO.	CARLO, ANTHONY V	12417	621.00	-	-	621.00	(577.53)	43.47				
41	88601384	860.1384	TOWER INS. CO.	DELORBE, MAXIMO	11117	630.00	-	-	630.00	(585.90)	44.10				
42	98601379	860.1379	TOWER INS. CO.	URQUIZA, ANTONIO	11917	648.00	-	-	648.00	(602.64)	45.36				
43	336204	290.6023	FFIC PORTFOLIO	CIESLAK, TIFFANY	52516	1,033.60	-	-	1,033.60	(987.00)	46.60				
44	342495	860.1347	TOWER INS. CO.	GILMAN, CYNTHIA	11717	672.00	-	-	672.00	(624.96)	47.04				
45	342942	129.1610	AM TRUST NA	GOTTESFELD, JOAN	13117	675.00	-	-	675.00	(627.75)	47.25				
46	342269	696.0003	HISCOX INSURANCE	KEELING, CHERYL	10917	576.00	-	-	576.00	(528.00)	48.00				
47	342532	860.1529	TOWER INS. CO.	MUNOZ, MANUEL V.	11317	693.00	-	-	693.00	(644.49)	48.51				
48	88601485	860.1485	TOWER INS. CO.	OSIPOWICH, DANIE	12417	702.00	-	-	702.00	(652.86)	49.14				
49	342568	860.1350	TOWER INS. CO.	RODRIGUEZ, CESAR	11717	708.00	-	-	708.00	(658.44)	49.56				
50	81291455	129.1455	AM TRUST NA	MCGLYNN, MARIA V	12517	789.00	-	-	789.00	(733.77)	55.23				
51	88601533	860.1533	TOWER INS. CO.	CASTILLO, JORGE	11317	792.00	-	-	792.00	(736.56)	55.44				
52	342548	860.1415	TOWER INS. CO.	MORRIS, JAMES V.	11717	807.00	-	-	807.00	(750.51)	56.49				
53	342612	129.1453	AM TRUST NA	GLANTZMAN, MICHE	11817	825.00	-	-	825.00	(767.25)	57.75				
54	342508	860.1428	TOWER INS. CO.	JACKSON, ERLEANE	11217	837.00	-	-	837.00	(778.41)	58.59				
55	342486	860.1514	TOWER INS. CO.	SALDIVAR, MARIO	11217	846.00	-	-	846.00	(786.78)	59.22				
56	342560	860.1502	TOWER INS. CO.	POTTER, GERALD V	11717	855.00	-	-	855.00	(795.15)	59.85				
57	342292	860.9921	TOWER INS. CO.	RAMIREZ, BELLAM	11017	867.00	-	-	867.00	(806.31)	60.69				
58	88601381	860.1381	TOWER INS. CO.	BONNIER, CATIA V.	12417	891.00	-	-	891.00	(828.63)	62.37				
59	342335	630.0022	NATIONAL INTERSTA	TWEEDIE, EARL V.	11117	877.50	-	-	877.50	(814.50)	63.00				
60	342622	129.1552	AM TRUST NA	MOORE, ZACHARY V	11817	913.50	-	-	913.50	(849.55)	63.95				
61	88600050	860.0050	TOWER INS. CO.	BOGATYRYOVA, TAM	12417	918.00	-	-	918.00	(853.74)	64.26				
62	81291413	129.1413	AM TRUST NA	DELL, ANDREW V.	12517	936.00	-	-	936.00	(870.48)	65.52				
63	342518	860.1537	TOWER INS. CO.	SUMMER, CINDY AN	11217	951.00	-	-	951.00	(884.43)	66.57				
64	88601445	860.1445	TOWER INS. CO.	ZHENG, MAN HENG	11317	1,860.00	-	-	1,860.00	(1,792.50)	67.50				
65	98609921	860.9921	TOWER INS. CO.	RAMIREZ, BELLAM	12517	987.00	-	-	987.00	(917.91)	69.09				
66	342102	290.2061	FFIC PORTFOLIO	ROMERO, XAVIER V	122716	524.80	-	-	524.80	(454.92)	69.88				
67	342549	860.1548	TOWER INS. CO.	ALAM, MOHAMMED A	11717	1,017.00	-	-	1,017.00	(945.81)	71.19				
68	88601447	860.1447	TOWER INS. CO.	VASQUEZ, AURELIO	12417	1,023.00	-	-	1,023.00	(951.39)	71.61				

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Additional Customer Quotes

"On the invoice Information page. No matter how many times I've trained or said if you' re reposting an invoice that the client requires use a post fix through the advanced screen… there is always someone that changes it on the main page, which firstly charges us for a second invoice and loses all of the history for the original invoice."

RECOMMENDATION: INVOICE NUMBER SHOULD BE DISABLED SO USERS ESPECIALLY NEW ONES DO NOT MODIFY

"Need to see timekeepers that are authorized by the client and see which ones are ave a rate assigned before proformas.."

RECOMMENDATION: CAN WE FLAG IF A TIMEKEEPER IS NEW — OR DOESN'T HAVE A RATE AND IDENTIFY CLIENTS/MATTERS THEY ARE AUTHORIZED TO DO BUSINESS WITH?

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Additional Customer Quotes

"We need to get consistency in eBilling as a whole. Using the LEDES standards that have been developed from inside out. As a whole get Clients and Vendors to use the standards. Need consistency with how Timekeepers are loaded, rates loaded, rejections, reduction notifications. Then maybe the systems could talk to each other. "

"We do not like to reverse and revise bills we like to track. CFO roundtable recommended to submit pre-bills, instead of finalized ebills but that is crazy to me. Sending a bill to client without having finalized in your own system seems backwards to me. "

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Pain Points and Opportunities

PAIN POINT

Horizontal scrolling is needed, worse the scroll bar doesn't appear until the bottom of the list for each section. Therefore, if there's 100 fees on an invoice, you need to scroll all the way down, move the scrollbar to the right, scroll all the way back up, and then make the edits if they are far to the right.

OPPORTUNITY

Need to ensure the design considers alternatives. For example, all data wraps or is contained without the need for a right and horizontal scroll bar.

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Pain Points and Opportunities-Validations

PAIN POINT

The ability to enter custom validations. For example, the firm has a folder with a list of PDFs indicating client guidelines. Often there's a disparity between those and the validations that are displayed: the biller has to go back and forth between the PDF and the validations screen to verify whether or not what we say is an error is something the client will actually care about. It's not so difficult for a biller who is very used to a certain client and their guidelines, but when billers leave or clients are reassigned, it becomes difficult to remember what that client wants.

OPPORTUNITY

Create a section to add client notes. These could be accessed in the validations screen. Enable the ability to edit/customize validations and their associated messages, this could likely take care of the problems, as admins could create messages that are self-explanatory to the billers.

Perhaps add all of the validation guidelines somewhere accessible within 3E or have these update dynamically with new guidelines

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Pain Points and Opportunities-Validations

PAIN POINT

Redundancy and Error Messaging validation

OPPORTUNITY

Batch Redundant Issues that have the same error: if the same error message appears for 100 lines of item, It would be better to list the unique error message, followed by a count of where it's located, rather than listing EACH one. It becomes very annoying to scroll through dozens of duplicates just to see the next error message.

- -Perhaps list the unique error message with a count, then have a drilldown within that, like an accordion, to see all instances of that error.
- likewise: apply one type of fix to all errors of the same type? sort of bulk updating them? (could be covered by Replace...)

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Pain Points and Opportunities

PAIN POINT

Edits are temporary. If an edit is made this information should be saved in eBH. Currently, if another analyst opens the same file within eBH, they can not see the updates. It remains as it was when originally pulled from the their Time Billing system, so all changes as lost.

OPPORTUNITY

Enable 2-way binding with the Vendors. Customers repeatedly asked for this feature and the ability to save it.

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Pain Points and Opportunities

PAIN POINT

Multi-payer – the sales team and 2 programmers told us it would take 2 weeks.
After 1.5 years we still now do not have multi payer working. We have switched to be Client specific, when we did that we had to use the split table. That piece is almost working.
We are working to get Clients that want 1 invoice with multiple matters on it.

PDF attachments for payers. Many of our client want pdfs and we have a hard time tracking this. We currently are sending pdfs from our outlook up to 16 Billers sending – implemented that got 30 pdfs a month. They hated the password their APs wanted noting to do with it, wanted the SAP to do it. We changed the free form email – which is great if all pdfs go to same place, so we back to going outside. Sometimes we need the pdfs to go to different people.

OPPORTUNITY

Need to look at how to make multi-payer easier for our Clients.

Need to allow pdfs to be uploaded and attached as the ledes file feed in from WHITE HILL or the system they are using in order to track the pdfs within the system.

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Pain Points and Opportunities

PAIN POINT

95% of their Timekeeper rates occur at a client level, but we currently have it set to a matter level.

- It would be helpful to just assign at a client level and have Timekeeper rates apply to all matters under that client.

OPPORTUNITY

Map at client level but allow for matter-level overrides if the user chooses to.

- This way, if there's a special scenario in a matter, you can override the client level configuration.

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Pain Points and Opportunities-Advanced Features

PAIN POINT

Many of the “advanced features” are used frequently.

OPPORTUNITY

Need to pull out specific “advanced features” and make them easily accessible.

- Ability to make changes to Timekeeper Fees
- Invoice Post Fix
- Extended Fields -would like the ability to add extended fields if they’re not already provided in our list of extended fields for a particular client. (giving users ability to add extended fields may take some burden off of support, but could also cause firms to fall out of sync with our lists of client guidelines)
- Adjustments
- For Multi-Matter Bill ability to propagate changes- For example an expense charge, ask if you want to make this change for all matters?

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Pain Points and Opportunities-Advanced Features

PAIN POINT

Some information is only changed in “advanced features” change for lines in Timekeeper summary. They do not change on every matter. This is also true for all rates on all matters. User currently needs to open 15 lines to make the change. **To make one change becomes laborious.**

OPPORTUNITY

Need ability for this information to propagate perhaps an option to change here or for all at a batch level.

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Thank you.

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