

Split Matter Billing – Two Types of Splits

LBBS Billing

Percentage Split

- All payors have the same rates
- The bill is split between the payors by a percent
- The total percent in the split detail needs to equal 100%

Tiered Rate Split

- Payors have different rates called Rate Matters
- The bill is split between the payors by a percent
- The total percent in the split detail needs to equal 100%
- The total percent in the prebill will be >100%

Split Matter Billing

LBBS Billing

Percentage Split – Same rate for all payors. Total split by percentage.

Splits are set up in the matter in Expert Entity. If a split needs updated please contact Data Changes.

To view the split detail: Expert Entity Manager>Matter>Time and Billing>Billing

The Consolidate/Split Bills detail will show if the matter is set for split and whether it is percentage or Tiered (different rates for different payors) split.

Consolidate / Split Bills	
<input type="checkbox"/> Consolidate Bills	Split From Bill Date: 4/1/2023
<input checked="" type="checkbox"/> Split Bills	Split To Bill Date: 12/31/2099
<input type="checkbox"/> Split Detail	<input type="checkbox"/> Tiered Fee Rates
<input type="checkbox"/> Split By Payor Count	

Split Bill Detail will show the payors and the percentage split.

Matter : Balfour Beatty Investments (801802) -
- Details
- Time and Billing
- Rules
- Red Flagged Words
- Fee Arrangements
- GL Account Overrides
- Split Bill Details

	Active	Effective Date	Expiry Date	Client To Split Bill	Billing Group	Payor Claim Number	Rate Matter	Deductible Amount	Fee Percent	Disbursement Perce...
	Yes	4/1/2023	12/31/2099	Gallagher Bassett Servi (801802-27131-A) (D64235)	RGM3[0057]EBILL Schmidt[0] Fentiman[P.O. Box 2934[Clinton][A] 52733 (M00001)			\$0.00	50.0000	50.0000
	Yes	4/1/2023	12/31/2099	AVP of Environmental CI (801802-27131-B) (D64332)	RGM3[0057]EMAILX Schmidt[0][Kagan] 499 Washington Blvd., 8th Floor Jersey City[NJ] (M00001)			\$0.00	50.0000	50.0000

Tiered Split – Different rates for different payors

Expert Entity Manager>Matter>Time and Billing>Billing

The Consolidate/Split Bills detail will show if the matter is set for split and whether it is percentage split or Tiered (different rates for different payors) split.

Consolidate / Split Bills

☐ Consolidate Bills
☒ Split Bills
☒ Split Detail
☐ Split By Payor Count

Split From Bill Date: 1/1/2022
Split To Bill Date: 12/31/2099
☒ Tiered Fee Rates

Split Bill Detail will show the payors, the rate matter and the percentage split.

Matter : Born, Inc (007648) - Wise, Larry & M

- Details
- Time and Billing
- Rules
- Red Flagged Words
- Fee Arrangements
- GL Account Overrides
- Split Bill Details

Active	Effective Date	Expiry Date	Client To Split Bill	Billing Group	Payor Claim Number	Rate Matter	Deductible Amount	Fee Percent	Disbursement Perce...
Yes	1/1/2022	12/31/2099	Mid-Continent Group (7648-285-D) (D58774)	TC7[0053]EMAILX[Cary][Jordan]PO Box 1409[Tulsa]OK 74101-1409 (M00001)	3004944	Wise, Larry & Monica v. Born, Inc. (7648-285-D)	\$0.00	6.2500	6.2500
Yes	1/1/2022	12/31/2099	Brandywine Group of Ins & R (7648-285-C) (D58773)	TC7[0053]EBILL[Cary][Davoli]2001 Bryan St Ste 3600[Dallas]TX[75201-3061 (M00001)	0000352921830000...	Wise, Larry & Monica v. Born, Inc. (7648-285-C)	\$0.00	62.5000	62.5000
Yes	1/1/2022	12/31/2099	Resolute Management (7648-285-A) (D58772)	TC7[0053]EBILL[Cary][Simpson]125 High St 10th Fl[Boston]MA[02110-2704 (M00001)	501-2-126-573	Wise, Larry & Monica v. Born, Inc. (7648-285-A)	\$0.00	31.2500	31.2500

Split Missing in BillBlast

Review the Split Bill Details in Entity Manager
Expert Entity Manager>Matter>Split Bill Detail

Note: If the yellow Read-only bar is visible, this means that changes cannot be made until the prebill is put back in WIP.

Matter : Fortitude-AIG (53772) - Park, et al.

- Details
- Time and Billing
- Rules
- Red Flagged Words
- Fee Arrangements
- GL Account Overrides
- Split Bill Details
- Auto Time and Disbursement Splits

Split Bills

Read-only - This information is read-only as the matter is included on a prebill.

Tiered Fee Rates:

Use Payor Jurisdiction Codes:

	Active	Effective Date	Expiry Date	Client To Split Bill	Billing Group	Payor Claim Number	Rate Matter	Deductible Amount	Fee Percent
	Yes	8/24/2023	12/31/2099	Allianz (53772-4-C) (D66212)	TIS3(0008)EMAILX Ryan(J)Lancer1465 N McDowell Blvd Petaluma(CA) 94954-6569 (M00001)	600-00-002276		\$0.00	20.0000
	No	8/24/2023	12/31/2099	Fortitude Re (53772-4-A) (D66210)	TIS3(0008)EMAILX Ryan(J)Zurkovsky10 Exchange PI FI 22 Jersey City(NJ) 07302-4934 (M00001)	501-832072-001; SMP 44 11 12		\$0.00	20.0000
	Yes	8/24/2023	12/31/2099	Brandywine Group (CHUBB) (53772-4-B) (D66211)	TIS3(0008)EMAILX Ryan(J)Gilliam510 Walnut Street, Philadelphia(PA) 19106 (M00001)			\$0.00	60.0000

The payor D66210 shows “No” in the Active column. This should be checked “active” if this is a current payor on the matter.

Note: If this is the same payor as the matter payor do not check the active box.

Check the box and click Save.

Matter : Fortitude-AIG (53772) - Park, et al. v Fosberg Laundry & Cleaners (000004) Q

Split Bills

☐ Tiered Fee Rates

☐ Use Payor Jurisdiction Codes

	Active	Effective Date	Expiry Date	Client To Split Bill	Billing Group	Payor Claim Number	Rate Matter	Deductible Amount	Fee Percent	Disbursement Perc...	Tax Percent
+ ADD NEW											
X	<input checked="" type="checkbox"/>	8/24/2023	12/31/2099	Allianz (53772-4-C) (D66212)	TIS3(0008)EMAILX Ryan(J)Lancer1465 N McDowell Blvd Petaluma(CA) 94954-6569 (M00001)	600-00-002276		\$0.00	20.0000	20.0000	20.0000
X	<input type="checkbox"/>	8/24/2023	12/31/2099	Fortitude Re (53772-4-A) (D66210)	TIS3(0008)EMAILX Ryan(J)Zurkovsky10 Exchange PI FI 22 Jersey City(NJ) 07302-4934 (M00001)	501-832072-001; SMP 44 11 12		\$0.00	20.0000	20.0000	20.0000
X	<input checked="" type="checkbox"/>	8/24/2023	12/31/2099	Brandywine Group (CHUBB) (53772-4-B) (D66211)	TIS3(0008)EMAILX Ryan(J)Gilliam510 Walnut Street, Philadelphia(PA) 19106 (M00001)			\$0.00	60.0000	60.0000	60.0000

Create a new prebill to see the updated split detail.

Note: If there are posted bills that need edited with the split update, the bills will need **reversed to WIP** and new prebills created to grab the payor update.

Prebill View

The corrected split will show a column in the prebill for each payor and the matter.

Ex. If there are three payors splitting the bill but one of those payors is **NOT** the master matter payor there will be a \$0 bill shown in the prebill list and in the prebill payor splits.

Prebill 4958710		Payor Splits				
Fortitude-AIG (053772) Park, et al. v Foasberg Laundry & Cleanse (000004)		Payor Info				
Prebill Status: New Payor Bill Status: Regular Assigned To: Ryan, Chris (19659)		Bill Payor:		Retainer Expiry Date:	1/1/1900	
Outline Edit Summ... Changes		Maximum Total Fees To Bill:		Fees Billed:		
▼ Park, et al. v Foasberg Laundry & Cleanse		Maximum Total Disbursements To Bill:		Disb Billed:		
<ul style="list-style-type: none"> - Bill Summary - Payor Splits - Bill Details - Matter Details - Payor Details - Time - Disbursements - Inquiries - Alerts 		Maximum Total To Bill:		Deductible Amount:		
	Total	Fortitude-AIG (053772)	Allianz (53772-4-...	Brandywine Group...	Fortitude Re (53772-...	
Fees to Bill	\$14,245.00	\$0.00	\$2,849.00	\$8,547.00	\$2,849.00	
Fee Percentage	100.0000%	0.0000%	20.0000%	60.0000%	20.0000%	
On Account Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Advanced Premium/Discount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Courtesy Premium/Discount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Hard Disbursements to Bill	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Soft Disbursements to Bill	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Disbursements Percentage	100.0000%	0.0000%	20.0000%	60.0000%	20.0000%	
On Account Disbursements	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Payor Subtotal	\$14,245.00	\$0.00	\$2,849.00	\$8,547.00	\$2,849.00	
Funds Applied	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Split Causing On Hold Status in BillBlast

If you have a bill that repeatedly moves to the On Hold status in BillBlast, check the split set up.

If the matter has duplicate split records it will move the bill to On Hold.

Example

The payors for this matter used to be D65197 Resolute and D65200 Trebuchet. The payor is now 100% D65197 Resolute which is also the matter payor.

Having all the splits selected is causing multiple records to be pulled in BillBlast which moves the bill to On Hold.

To solve, uncheck the splits in the Active column of Split Detail and save the matter.

Billing

Jurisdiction Code:

NA (NA)

Matter Plan:

Standard UTBMS Task Codes with Activity Codes (LA)

Billing Payor:

Resolute Management (2711-55-C) (D65197)

Bill Group:

SCC1|0020|EBILL|Coleman|0|Benton|Direct Claim Division|141 W Jackson Blvd Ste 18 (324495) M00001

Bill Frequency:

Monthly (M)

Next Cycle Bill Date:

4/30/2024

Matter Payor

	Active	Effective Date	Expiry Date	Client To Split Bill	Billing Group	Payor Claim Number	Rate Matter	Deductible Amount	Fee Percent	Disbursement Perce...	T
+ ADD NEW											
x	<input checked="" type="checkbox"/>	5/23/2023	7/21/2023	Resolute Management (2711-55-C) (D65197)	SCC1 0020 30 (MAIN)			\$0.00	23.5100	23.5100	
x	<input checked="" type="checkbox"/>	7/22/2023	10/24/2023	Resolute Management (2711-55-C) (D65197)	SCC1 0020 30 (MAIN)			\$0.00	100.0000	100.0000	
x	<input checked="" type="checkbox"/>	5/23/2023	7/21/2023	Trebuchet Holdings (2711-55-F) (D65200)	SCC1 0020 EBILL Huffman 0 Richards 3RD FL, 19 PAR-LA-VILLE Rd HAMILTON HM 11 PO (M00001)		Brown, Garland and Joyce v. Scapa (2711-55-F)	\$0.00	76.4900	76.4900	

Matter Split Detail