

## Billing Worksheet Instructions

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### Reminders

- Name your Billing Worksheet for each job as follows:
  - Job # Billing, e.g., 908765 Billing.
- Download the Billing Worksheet to your computer and only open with **Adobe Reader**. **Do not** open and fill out the Billing Worksheet if it opens with your Windows Browser.
  - Set Adobe Reader as your default PDF reader.
- This Billing Worksheet is being used nationwide at USLS, so if any of the fields on the form do not apply to you, just skip or enter N/A.
  - Please note that the **Original held by Code** option is for California only.
- Fill out all applicable fields.
- Instructions provided are for relevant information and a supplement to watching the instructional video.
- To avoid missing fields, make sure to start at the top and tab through each question field so that the priority options will flag or display across the top of the form.

### Filling out the Billing Worksheet (See the Billing Worksheet Instructional Video for full instructions)

- **Job Information**
  - Fill in all applicable fields and drop-down options.
  - Date fields contain drop-down menu with calendar options.
  - Some fields will provide **alerts** at the top of the page
    - **5-Day Expedite**, **O&1**, **By Code**, etc.
  - For Expedited jobs, also enter in the Expediting Attorney name.
  - Job Type: Choose your job type or if not listed, choose Other (Enter Below) and type the job type information in the **Other Job Information** text box provided.

### Confidential Information

- Select "Yes" or "No." If you select "Yes," in the text box, provide details for the confidential portion.

### Caption

- Fill in or copy/paste all the caption information. The box will expand to accommodate all the caption information.
  - Please make sure to include the entire case caption information with no abbreviations.

### Job/Proceeding Information

- Job Type Information fields.
  - According to the job type, there will be fields to fill in according to witness or proceeding information.

## Billing Worksheet Instructions (Cont.)

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### Ordering Parties

- Only list attorneys that have requested an order.
  - Enter the noticing attorney firm and name first and then the opposing attorney firms and names.
  - Enter all applicable information for each firm.
  - If a Copy was ordered, check the Copy box.
  - For the **On the Record** column, check the box if a copy was ordered **on the record**.
    - Reminder, it is very important to get the copy order on the record to ensure your payment will be processed during the payment cycle in which the copy is produced.
  - If a Rough Draft is ordered, check the box on the column, and then at the bottom of the Ordering Parties box, enter the number of rough draft pages where indicated.

### Special Instructions

- Provide any additional information as needed.

### Appearances

- **Please include full appearance information.**
  - Copy and paste or type in all information pertaining to appearance.
  - Full address, phone numbers, email, videographer, interpreter, also present, etc.
    - Appearance field will accommodate as much text as needed.