

Time Rates

This manual is designed to help users understand how to add and edit author's Time Rates in OneLaw



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Time Rate Types

Time Rate Types are set up in the Administration Tab>Manage Codes

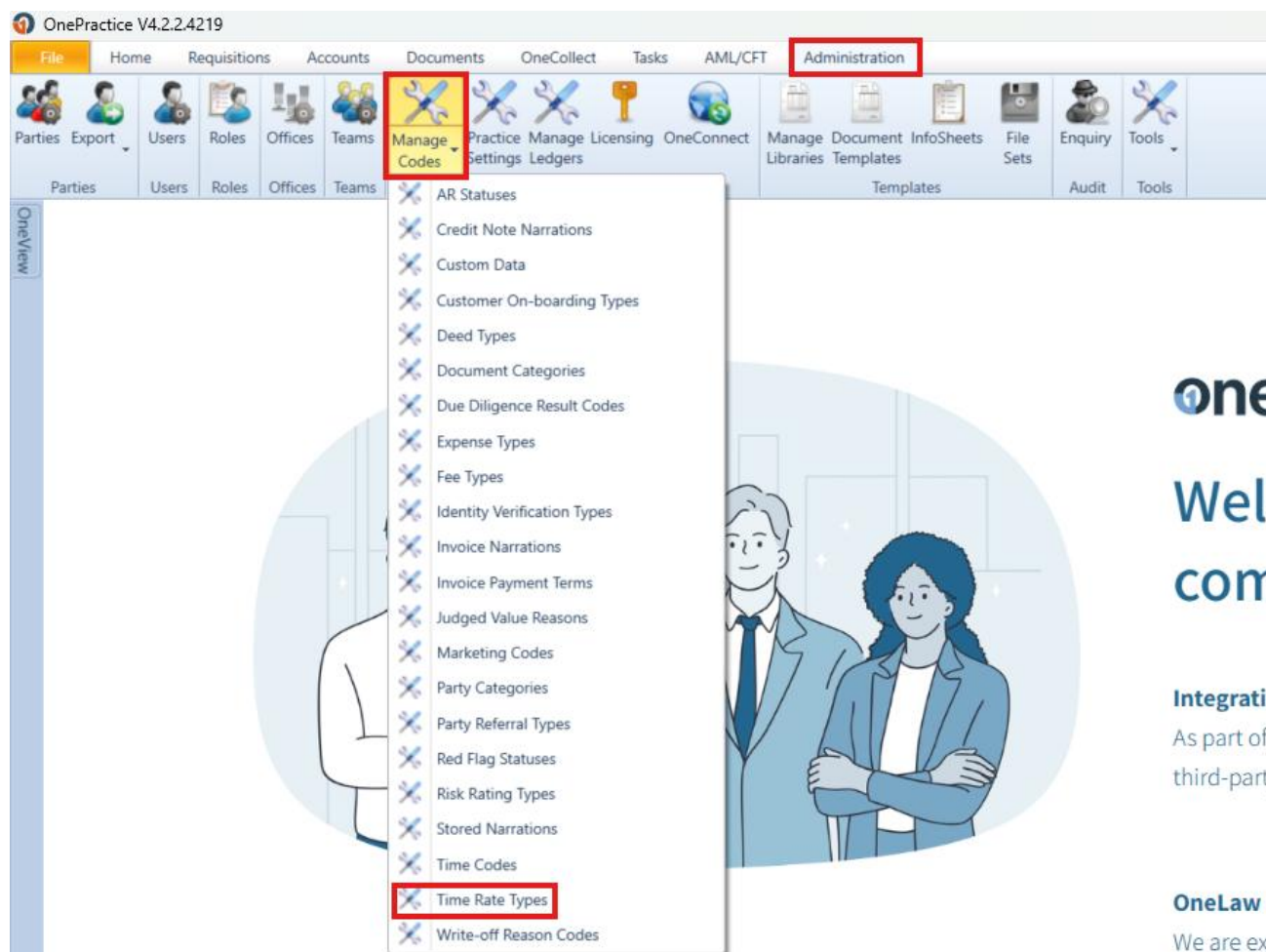


Figure 1.

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The default rate is set to 'Standard' – PLEASE DO NOT CHANGE THIS.

Add a Time Rate Type using the green plus (NOTE there is no red minus in this section, Time Rate Types cannot be deleted, but can be made inactive – more on Page 9)

Insert the relevant 'Code' and 'Description'

Tick the box to make the Time Rate 'Active'

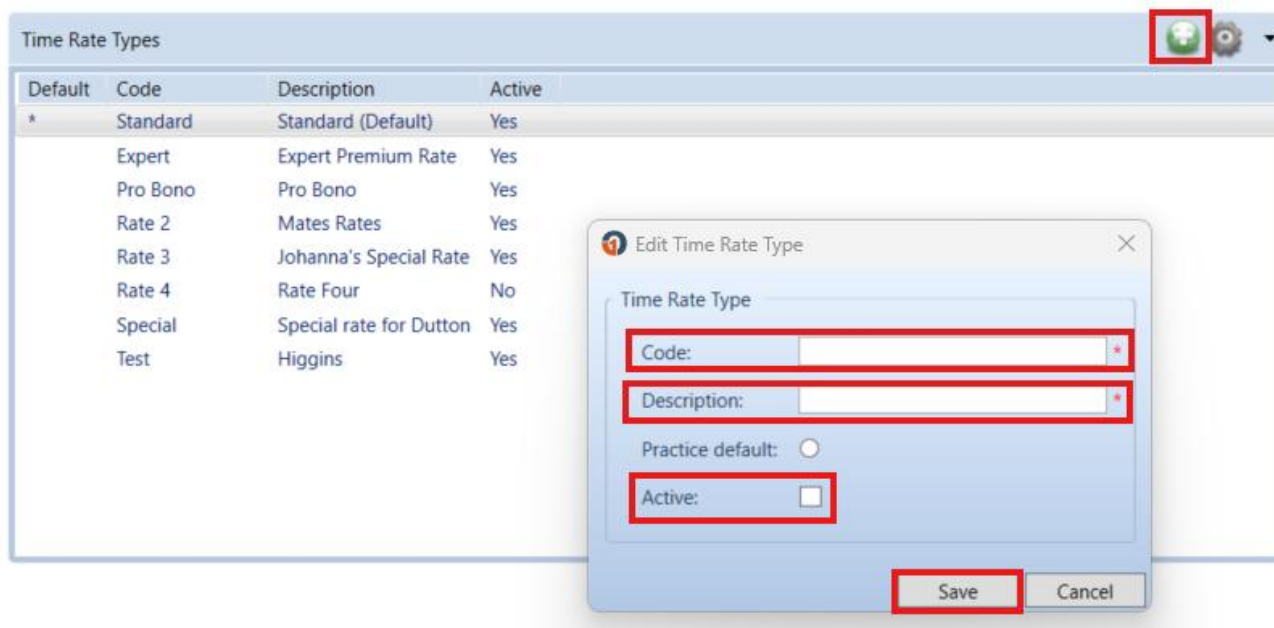


Figure 2.

Time Rates for Users

Each author/user must have an hourly rate set against a Time Rate to record WIP to that rate. This hourly rate can be loaded separately to a user e.g. when they start at your firm, or in bulk e.g. when Time Rates are updated annually.

Single User

1. On the Administration Ribbon, click 'Users' – use the green plus to create a new user or double click to open or use the grey cog to edit an existing user

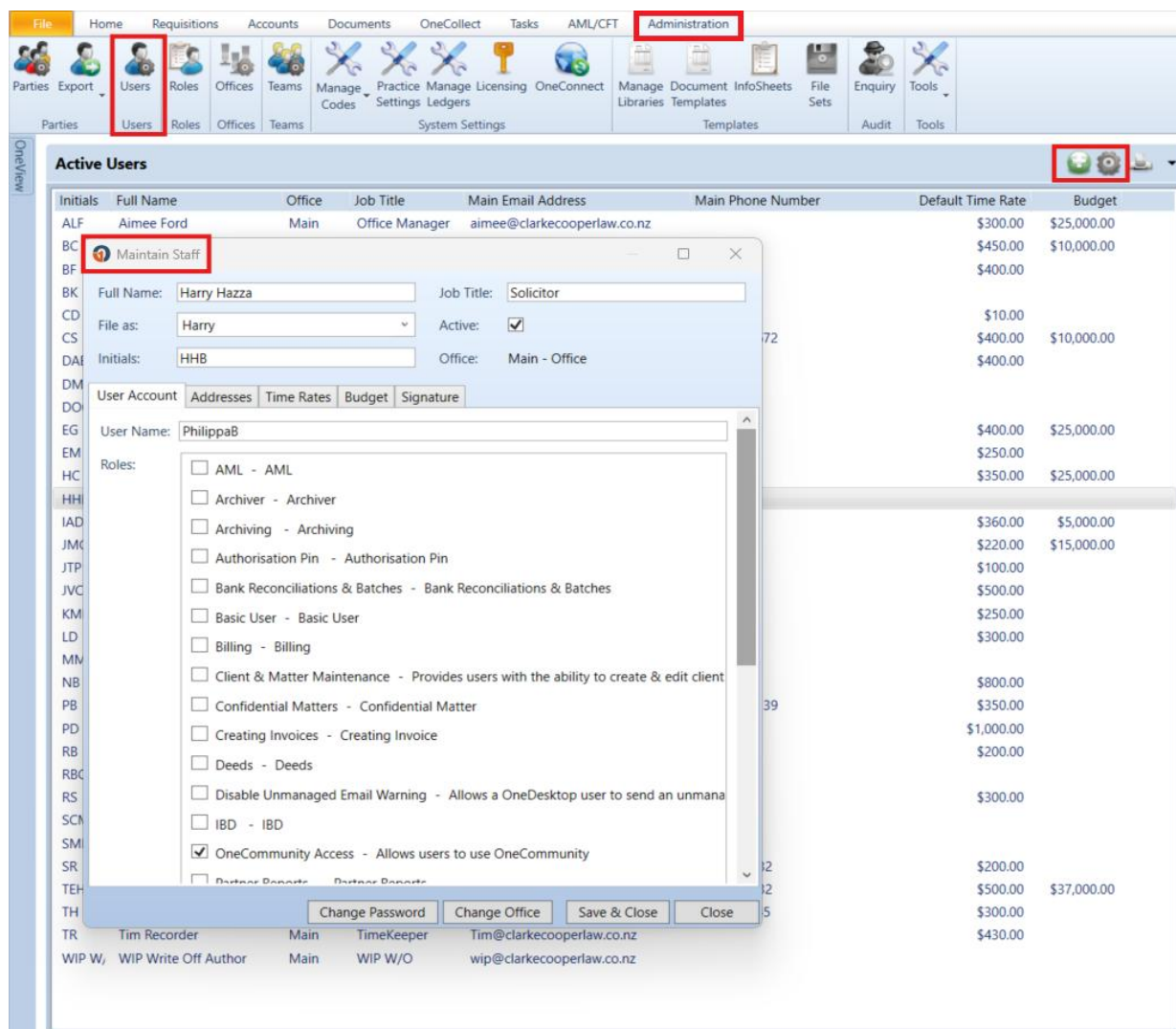


Figure 3.

2. Click on the Time Rates tab
3. Double click on the rate or use the grey cog to add/edit the current time rates

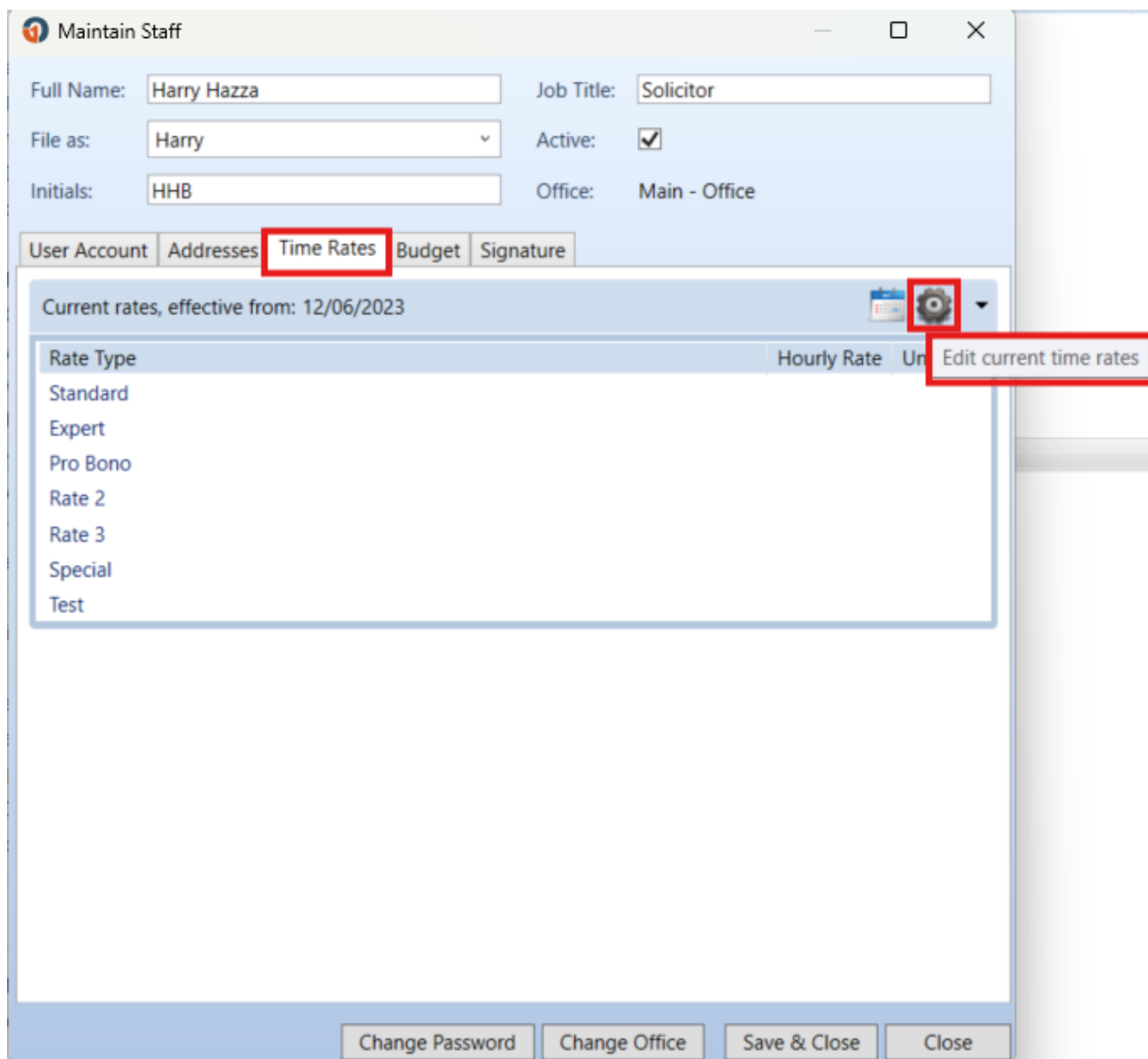


Figure 4.

4. Choose the date the time rates are to be effective. Type in the Hourly Rate. The Unit Rate will be automatically calculated from this – each user should have a Standard Rate; all other rates are optional (NOTE: Firms customise their own rates) – click ‘OK’

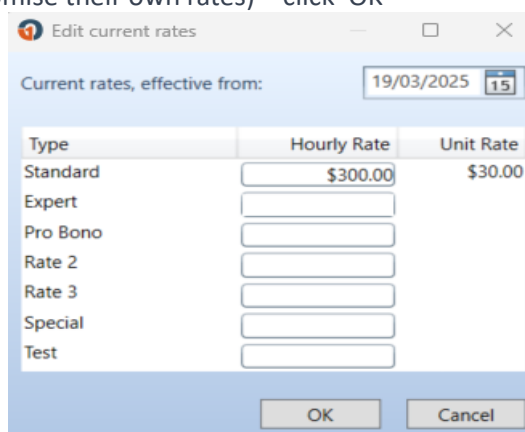


Figure 5.

- A warning message will appear as below, even if this is a new user and you have chosen today's date – click 'Yes'

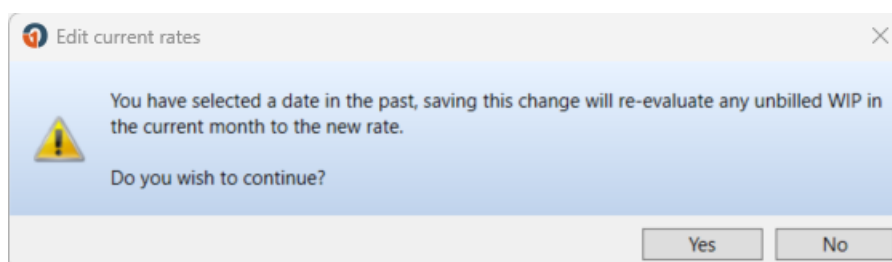


Figure 6.

NOTE: If setting up a user that will start (say) next month, use the calendar icon to schedule Time Rates instead.

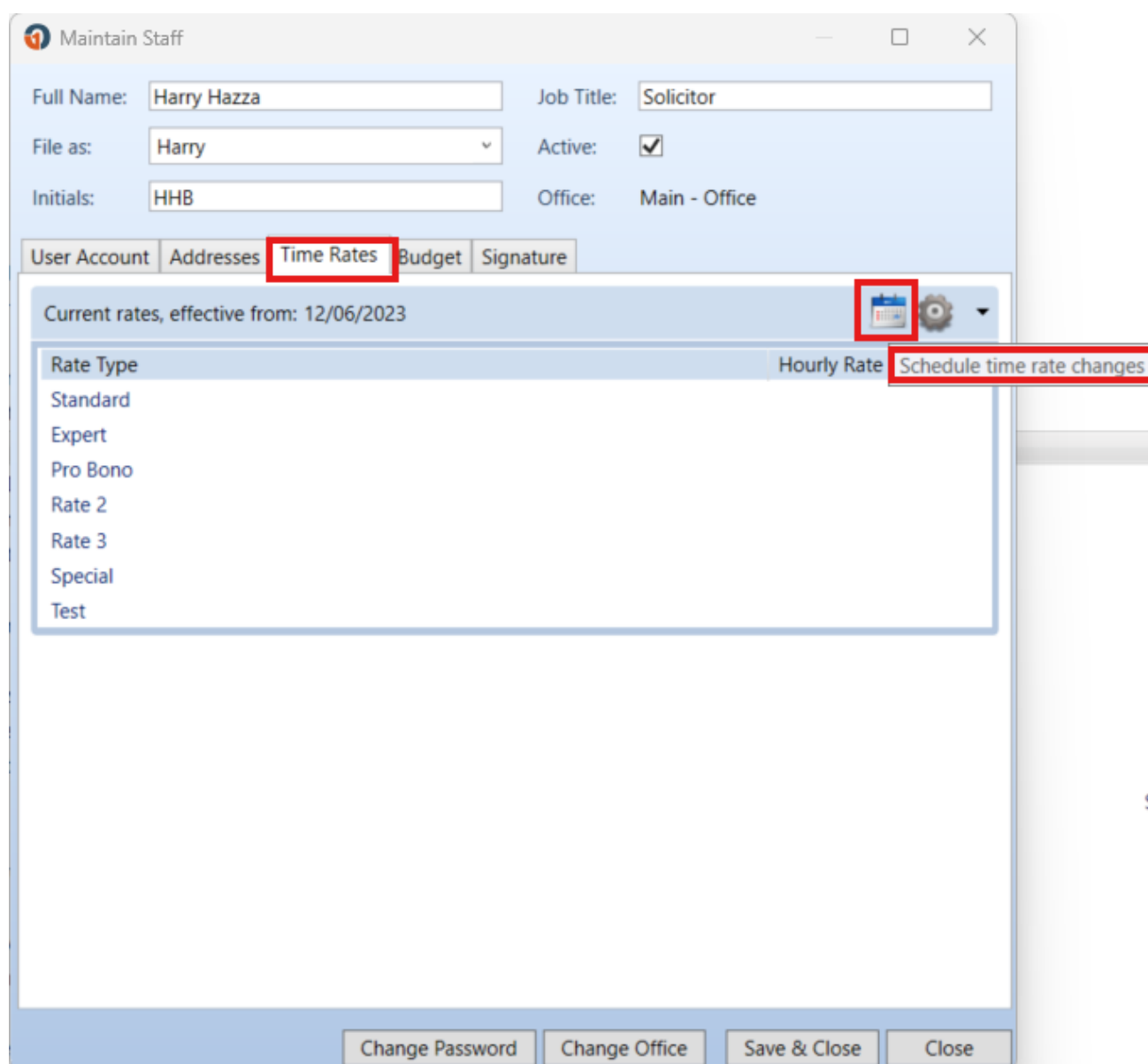


Figure 7.

- + Select the date, add hourly rates as above and click 'OK'

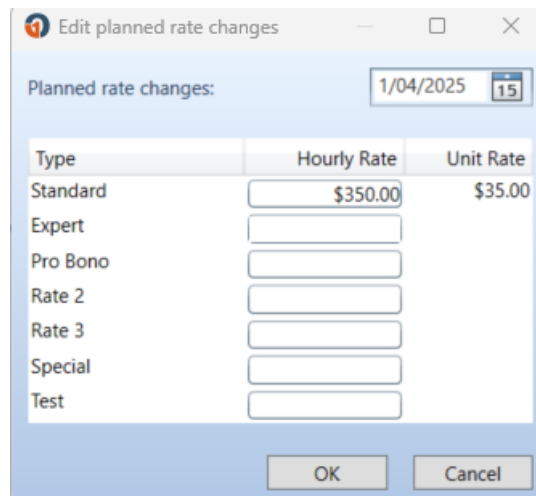


Figure 8.

- + The planned changes display as below (Use the red minus to delete and start over if needed)

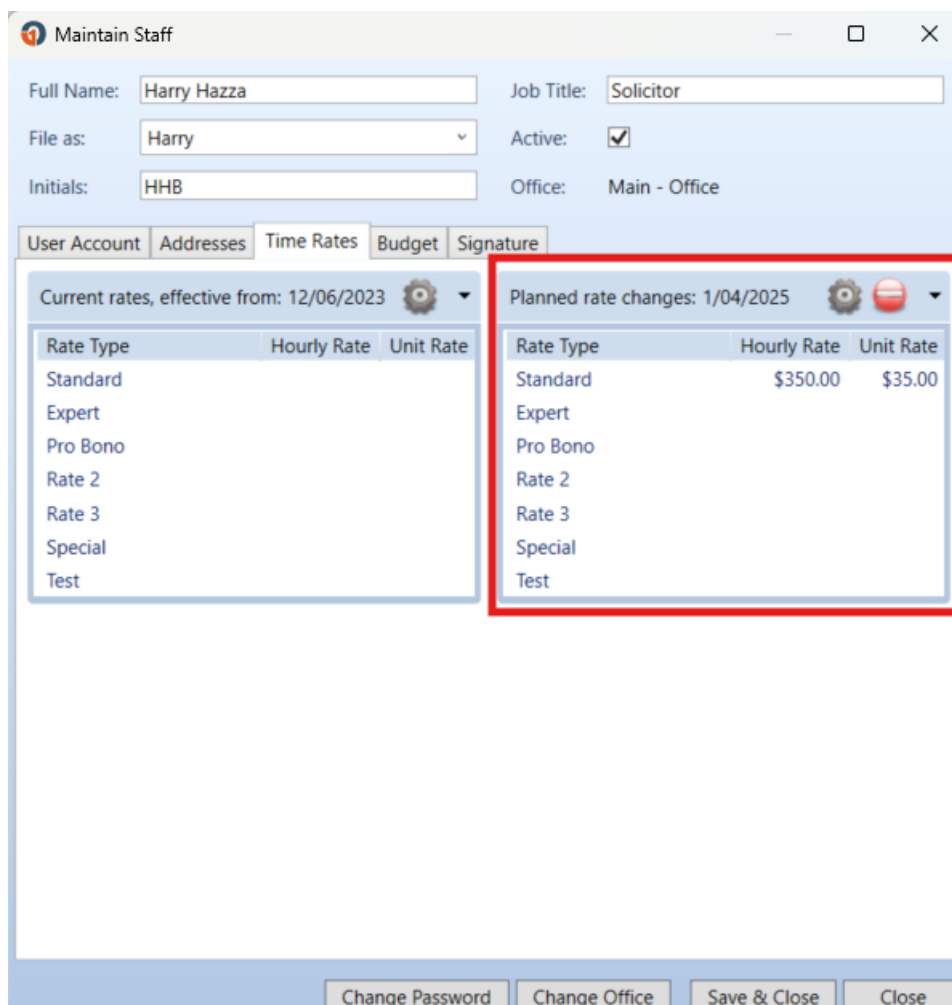


Figure 9.

- + Click 'Save & Close'

Bulk Upload of Time Rate Changes

1. Navigate to the Administration Tab and under the Tools menu, select 'Export Users Details'

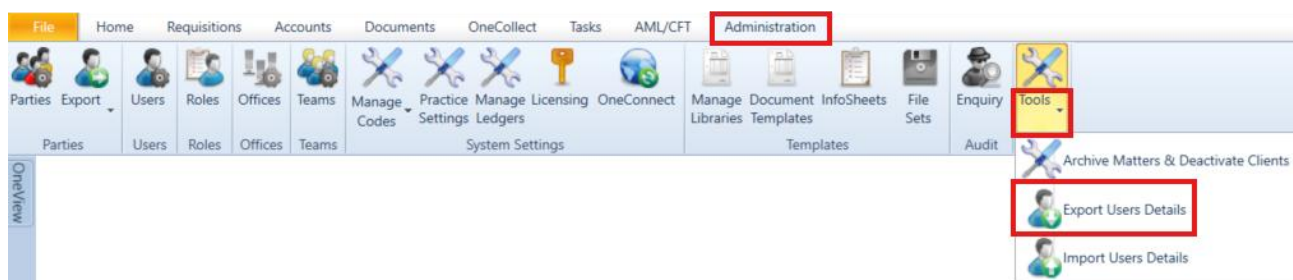


Figure 10.

This will produce an Excel workbook with the following tabs – see Figure 11 below.



Figure 11.

2. The Planned Time Rates can be edited and the details imported back into OnePractice.
3. Insert the 'Planned Rate Change From' date as per Figure 12 below
4. Copy existing time rates from the 'Current Time Rates' tab, then make changes as required (Note: any that are blank will not be uploaded and these users will not have time rates set)

	A	B	C	D	E	F	G	H
1	Initials	FullName	Planned Rate Change From	Standard	Expert	Pro Bono	Rate 2	Rate 3
2	ALF	Aimee Ford	1/04/2025	\$350.00				
3	BC	Bex Craig						
4	BF	Bex Falconer	1/04/2025	\$450.00	\$525.00		\$375.00	\$425.00
5	BK	Bob Knight						
6	CD	Caleb Davies	1/04/2025	\$25.00				
7	CS	Caio Souza	1/04/2025	\$425.00	\$430.00		\$375.00	\$425.00
8	DAB	Daniel Boyle	1/04/2025	\$425.00				
9	DM	Danie Meissel						
10	DOC	David Cooper						
11	EG	EJ Gray	1/04/2025	\$425.00				
12	EM	Emily McDonnell	1/04/2025	\$275.00				
13	HC	Hannah Christie	1/04/2025	\$375.00	\$475.00		\$325.00	\$525.00
14	HHB	Harry Hazza	1/04/2025	\$300.00				
15	IAD	Isabel Aimee Duncan						

Figure 12.

Once the data is entered, save the Excel workbook to your local drive, and close.

5. Navigate to the Administration Tab and under the Tools menu, select 'Import Users Details'

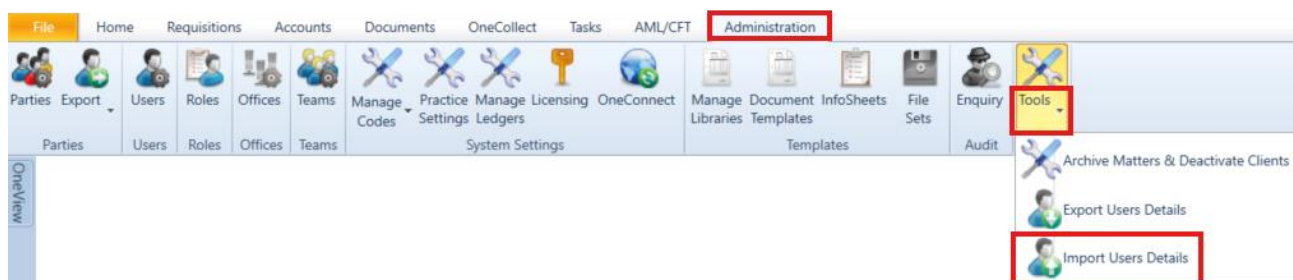


Figure 13.

- Browse to the saved Excel file. Select the file and click 'Import'.

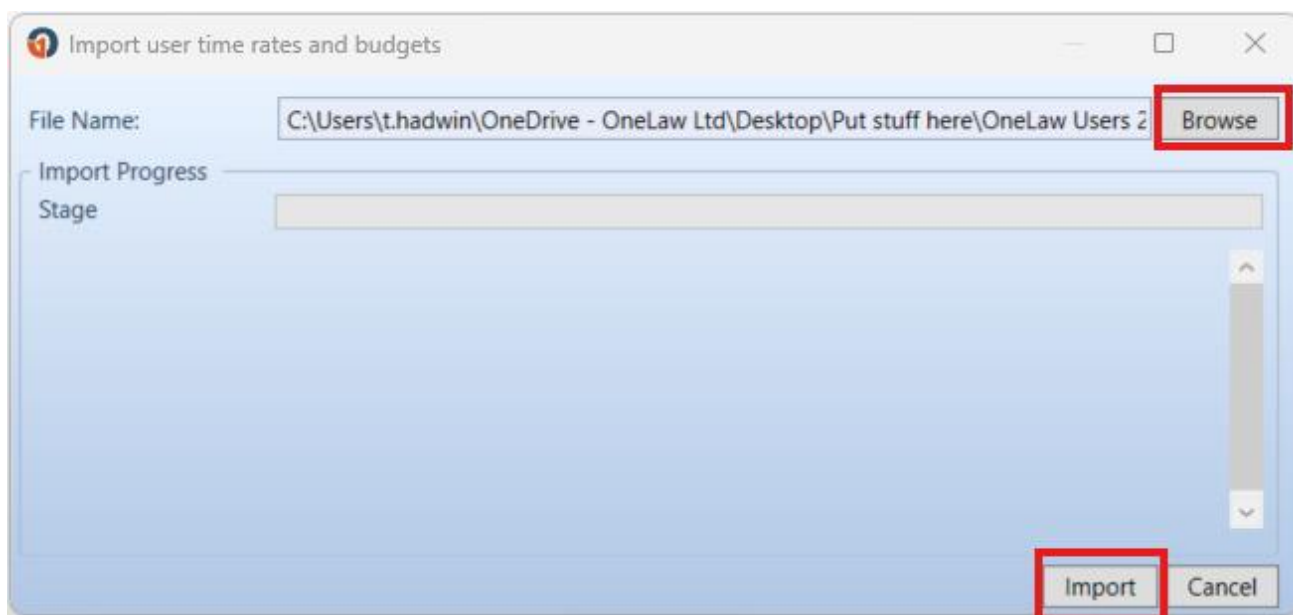


Figure 14.

- Once the progress bar is complete, close the 'Import user time rates and budgets' dialog box. Any data that had been included in the Planned Time Rates will now have been imported into each user's record.

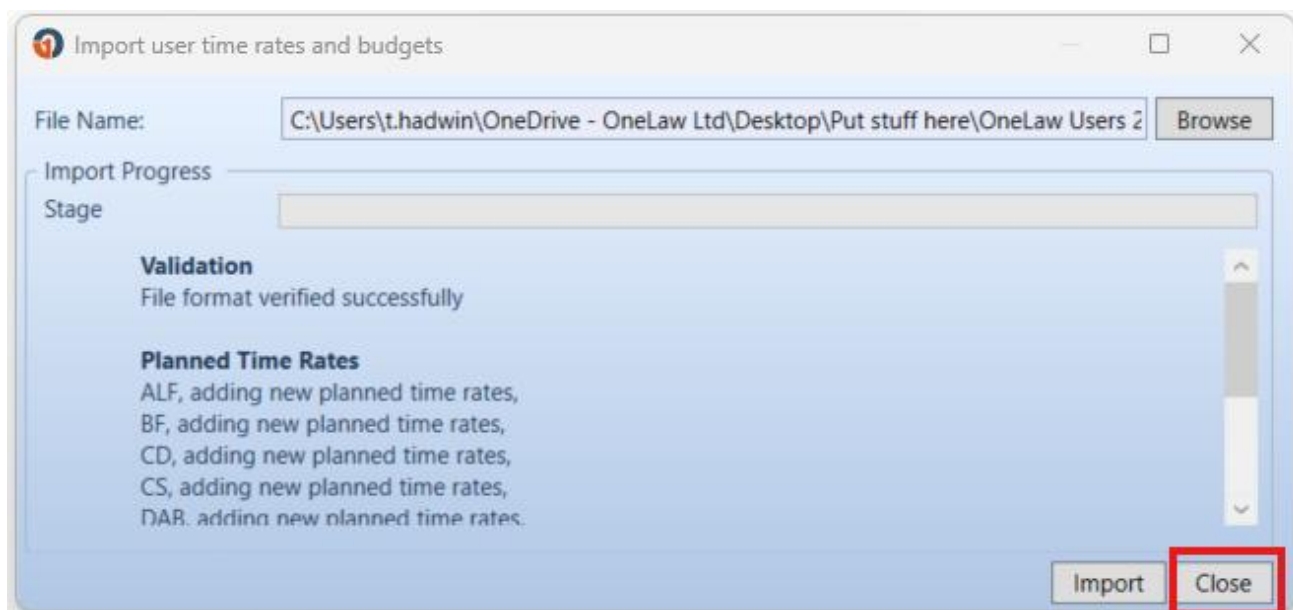


Figure 15.

Managing Time Rate Types

A Time Rate cannot be deleted, but can be made inactive, if it is not assigned as a default to a client or matter.

Administration Tab>Manage Codes>Time Rate Types – double click on the time rate or highlight and use the grey cog to edit – untick “Active” then click ‘Save’

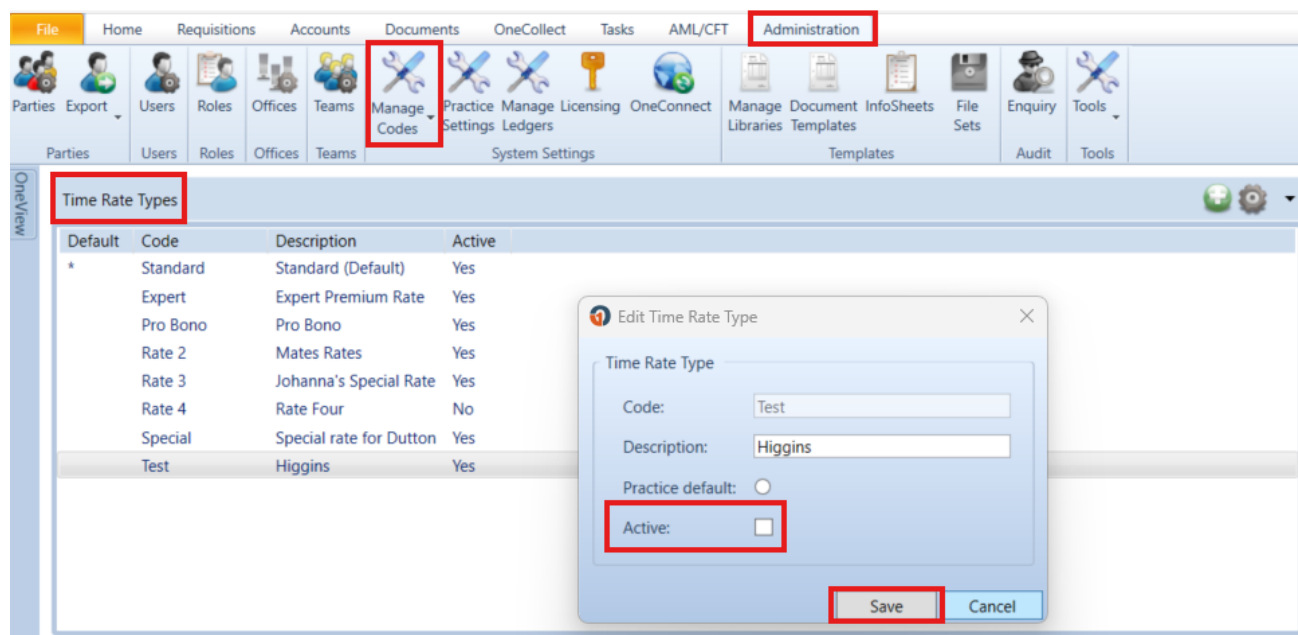


Figure 16.

If the Time Rate is in use – either at client level or at matter level, the following message will appear

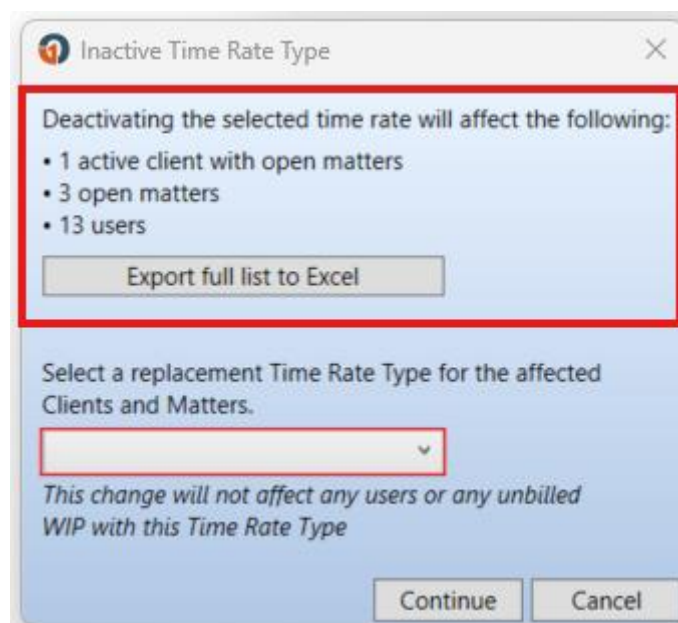


Figure 17.

Click 'Export full list to Excel' to review the list of clients, matters and users that the deactivation of this Time Rate would affect. The Excel workbook will have multiple tabs as per Figure 18 below.

1	Client Name	Client Number		
2	Jeffery Charles Conference	1042		
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				

< >
Affected Clients
Affected Matters
Affected Users

Figure 18.

If the Time Rate is still to be deactivated, choose a replacement Time Rate from the dropdown list and click 'Continue'. The rates will be replaced, and the dialog box will close.

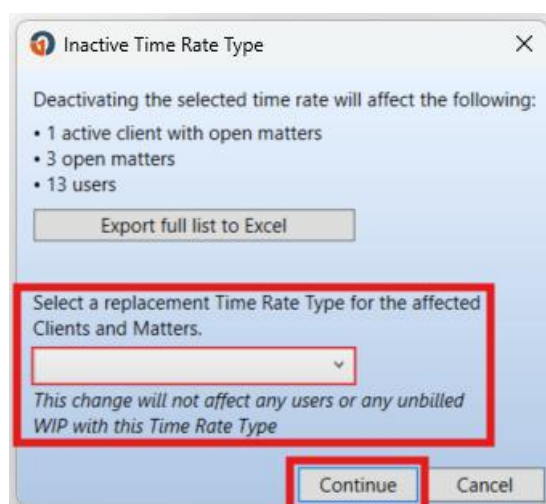


Figure 19.

Client Default Time Rate

A default Time Rate can be set at client level, any matters created after this time rate is set, will default to this time rate.

Open the client and select 'Edit Party' – click the 'Financial' tab – use the drop-down menu to select a different Time Rate – click 'Save & Close'

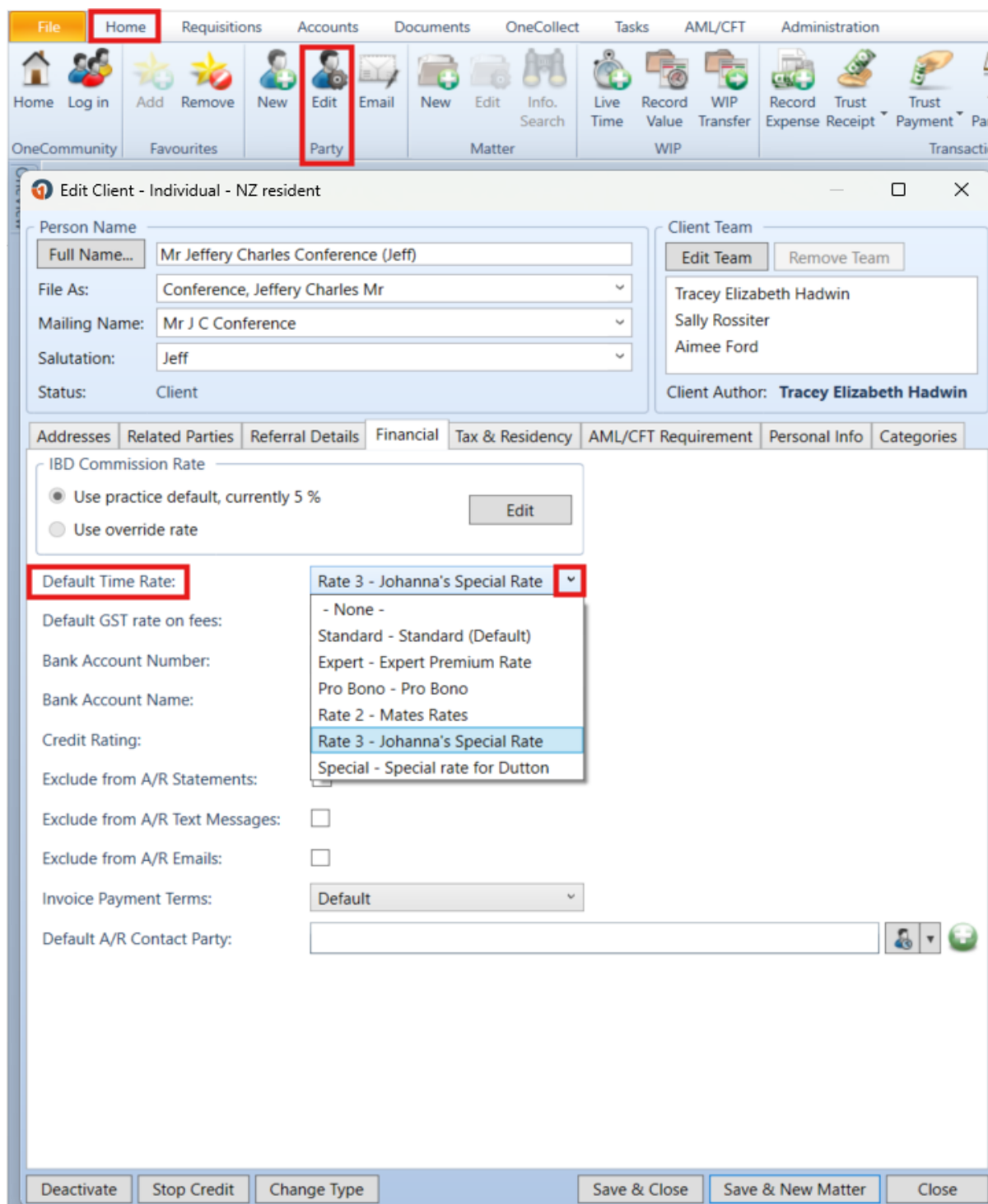


Figure 20

Matter Default Time Rate

A default Time Rate can be set at matter level, any WIP records created after this time rate is set, will default to this time rate.

Open the matter and select 'Edit Matter' – use the drop-down menu to select a different Time Rate – click 'Save & Close'

The screenshot shows the 'Edit Matter' window for 'Purchase 67 United Road, Honikiwi (1042.2)'. The 'Default time rate' dropdown menu is open, showing options like 'Standard - Standard (Default)', 'Expert - Expert Premium Rate', 'Pro Bono - Pro Bono', 'Rate 2 - Mates Rates', 'Rate 3 - Johanna's Special Rate', and 'Special - Special rate for Dutton'. The 'Matter team' section lists Tracey Elizabeth Hadwin and Sally Rossiter. The 'Billing details' section includes fields for Default GST rate on fees, Billing party, A/R contact party, Billing classification, Fees, and Costs/disbursements.

Figure 21.

Note: When a matter has a default Time Rate set, all authors that record WIP to that matter, need to have an hourly rate set for that Time Rate or they will get the error message as per Figure 22 below

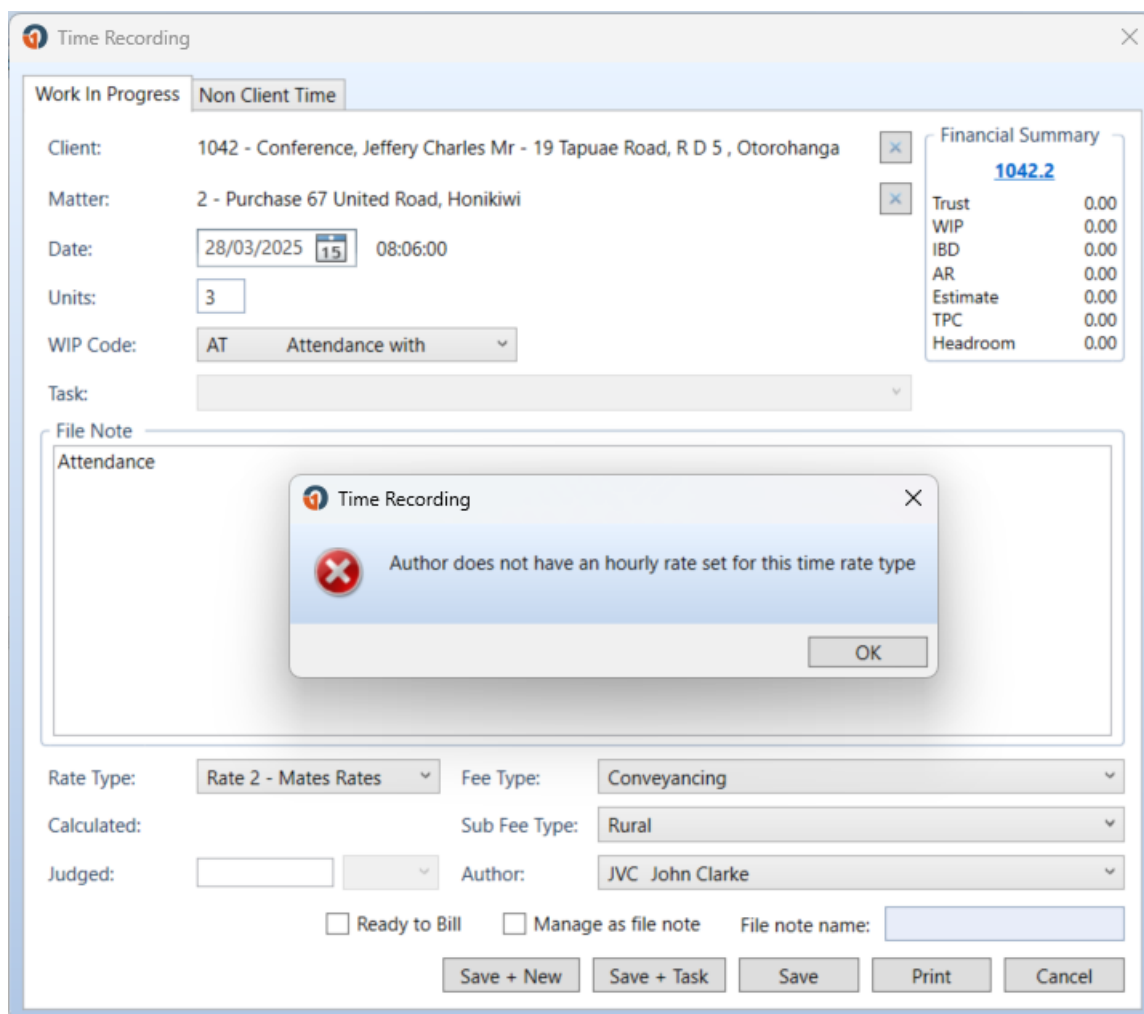


Figure 22.

The Rate Type shows, but the Calculated amount is blank, as the Author does not have an hourly rate set for this time rate type.