

## **ID Guide to the Billing Management System (BMS)**

Innovative Discovery is using a new proprietary time entry and billing management system, both created using Power Apps. The system was created to standardize billing and time entries across all departments and all users. Every entry in the Billing Management System (“BMS”), once saved, can either be saved for further edits or submitted for approval.

If you have any questions or issues with access, please contact [MR-HR@id-edd.com](mailto:MR-HR@id-edd.com).

### **How To Access BMS**

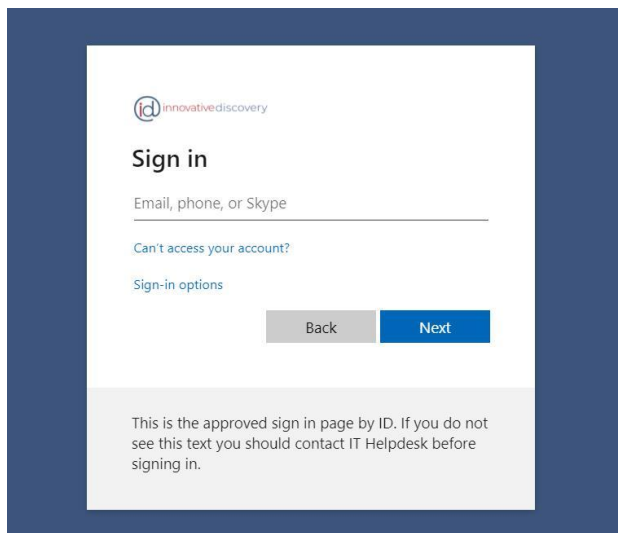
1. By clicking on the **Power Apps** link below, users can go directly to BMS.

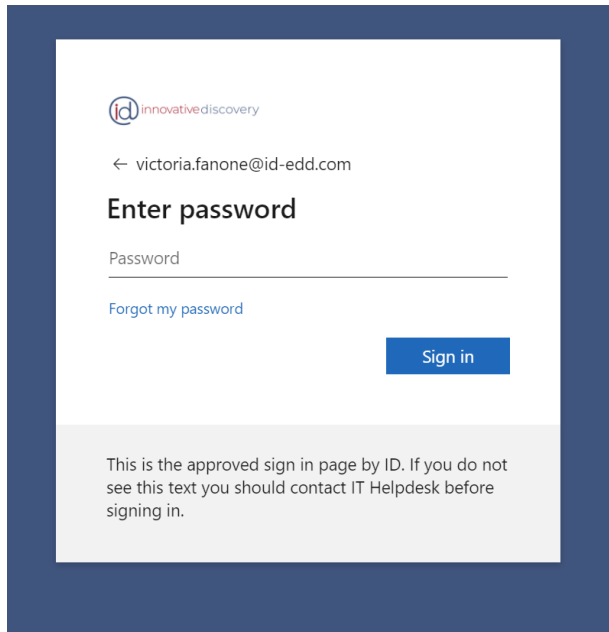
[Billing Management System](#)

### **How To Log-In To and Use BMS**

#### ***Log In Screen***

1. When logging in to BMS for the first time, users will be taken to a sign in page. Users will input the ID email address and password provided.





id innovative discovery

← victoria.fanone@id-edd.com

## Enter password

Password

[Forgot my password](#)

Sign in

This is the approved sign in page by ID. If you do not see this text you should contact IT Helpdesk before signing in.

## How To Enter Time Into The BMS

1. Select the project **Code Name** corresponding to your time entry by clicking on the drop down box. The user will have access to all of the projects they are currently working on in the drop down box.



Code Name	Billing Code	Billing Description	Billing Date	Time	Status
Project Blue Harvest x			10/29/2020	HR 4 : MIN 0	UnSaved
Project Blue Harvest					
Project ID Administration					
Project United Health					

Monday (Oct 26, 2020) Daily Total: 8

Tuesday (Oct 27, 2020) Daily Total: 9.75

Wednesday (Oct 28, 2020) Daily Total: 10

Thursday (Oct 29, 2020) Daily Total: 4

Friday (Oct 30, 2020) Daily Total:

Save Daily Entries

Submit Daily Entries

2. Select the corresponding **Billing Code** or line item for which you wish to enter your time.

\*1 Entry(s) UnSaved

Monday (Oct 26, 2020)	Daily Total: 8												
Tuesday (Oct 27, 2020)	Daily Total: 9.75												
Wednesday (Oct 28, 2020)	Daily Total: 10												
Thursday (Oct 29, 2020)	Daily Total: 0												
<table border="1"><thead><tr><th>Code Name</th><th>Billing Code</th><th>Billing Description</th><th>Billing Date</th><th>Time</th><th>Status</th></tr></thead><tbody><tr><td>Project Blue Harvest</td><td>ST-0001 - Law Clerk I</td><td></td><td>10/29/2020</td><td>HR 0 : MIN 0</td><td>UnSaved</td></tr></tbody></table>	Code Name	Billing Code	Billing Description	Billing Date	Time	Status	Project Blue Harvest	ST-0001 - Law Clerk I		10/29/2020	HR 0 : MIN 0	UnSaved	<div><div>Save Daily Entries</div><div>Submit Daily Entries</div></div>
Code Name	Billing Code	Billing Description	Billing Date	Time	Status								
Project Blue Harvest	ST-0001 - Law Clerk I		10/29/2020	HR 0 : MIN 0	UnSaved								

ST-0001 - Law Clerk I

ST-0001 - Law Clerk I

ST-0002 - Law Clerk I - Spanish

3. Select the **Billing Date** by clicking in the Billing Date box shown below which brings up a calendar display on your screen. Select the correct date corresponding to the work performed and then select *Ok* at the bottom of the calendar.

Tuesday (Oct 27, 2020)	Daily Total: 9.75												
Wednesday (Oct 28, 2020)	Daily Total: 10												
Thursday (Oct 29, 2020)	Daily Total: 0												
Friday (Oct 30, 2020)	Daily Total:												
Saturday (Oct 31, 2020)	Daily Total:												
Sunday (Nov 01, 2020)	Daily Total:												
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Code Name	Billing Code	Billing Description	Billing Date	Time	Status								
Project Blue Harvest	ST-0001 - Law Clerk I												

October 29 2020

October 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Ok Cancel

- The **Time** box is where users enter the time to be billed for the corresponding Billing Item in either 6 minute or 15 minute increments depending on how the matter was set up in BMS.

Code Name	Billing Code	Billing Description	Billing Date	Time	Status
Project Blue Harvest	ST-0001 - Law Clerk I		10/29/2020	HR 4 : MIN 0	UnSaved

- Users also have the option to delete the entry from BMS by clicking on the trashcan icon in the right corner of the screen (highlighted in yellow in the screen above).
- Once the entry is saved in BMS, users can either add additional entries by pressing the “+” symbol (highlighted in yellow below) for that specific client/matter or they can save or submit the entry to BMS for final approval.

\*1 Entry(s) UnSaved

Code Name	Billing Code	Billing Description	Billing Date	Time	Status
Project Blue Harvest	ST-0001 - Law Clerk I		10/29/2020	HR 4 : MIN 0	Saved
			10/29/2020	HR 0 : MIN 0	UnSaved

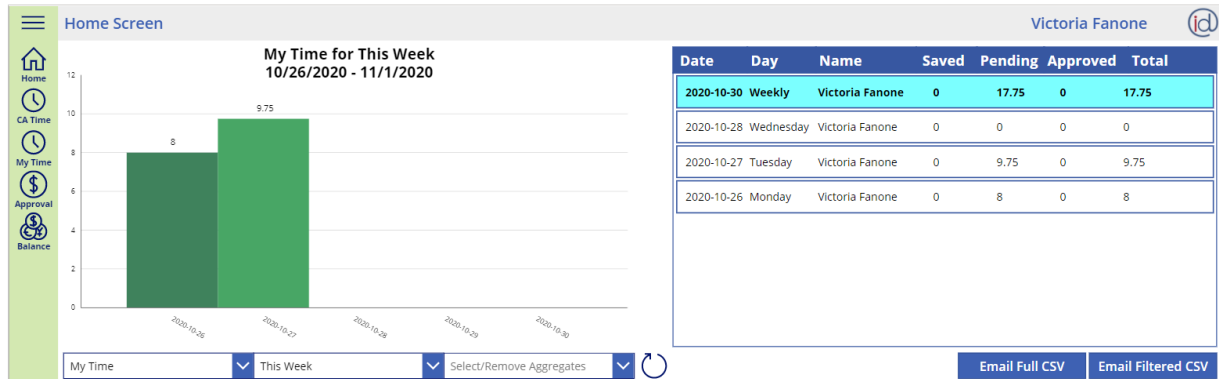
7. Users must select one of the following two options found in the upper right part of the screen:  
***Save Daily Entries*** or ***Submit Daily Entries***.

Code Name	Billing Code	Billing Description	Billing Date	Time	Status
Project Blue Harvest	ST-0001 - Law Clerk I		10/29/2020	HR 4 : MIN 0	Saved
			10/29/2020	HR 0 : MIN 0	UnSaved

Save Daily Entries  
Submit Daily Entries

8. The ***Save Daily Entries*** button saves your entry to BMS and allows users to make further edits as needed.
9. We recommend users select the ***Submit Daily Entries*** option which saves and submits the time entry(ies) to BMS for system or manager approval.

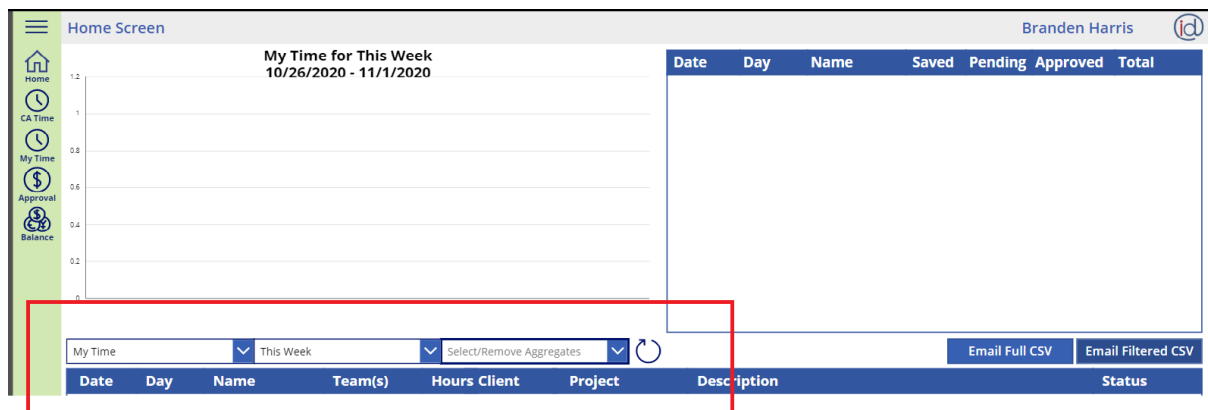
## BMS Home Screen Features



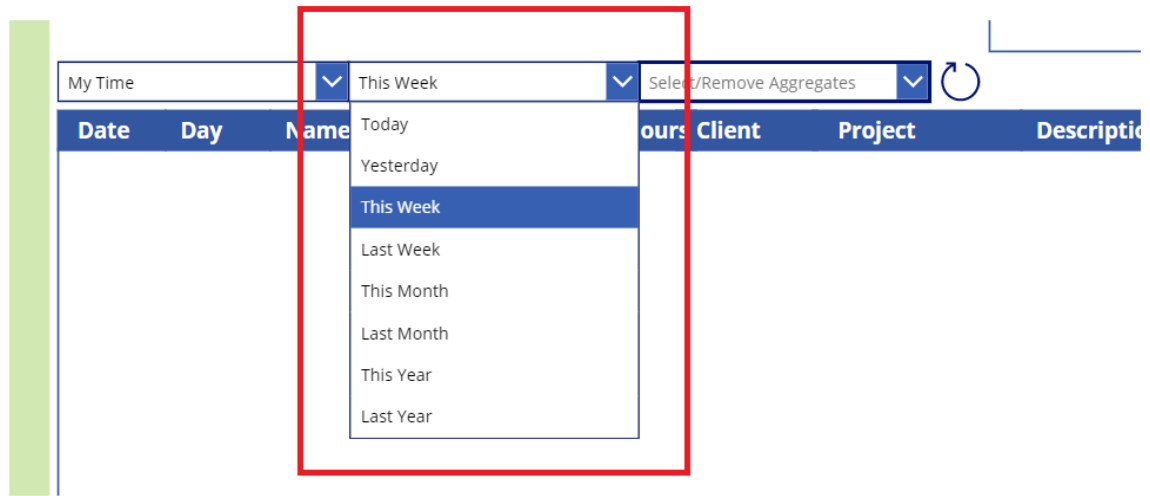
1. When logging in to BMS, users are taken to the *Home Screen* (see screenshot above) where they see a graphical summary of their time entered for that week as well as a daily grid breakdown of their time.

**\*\*Feature Note:** BMS defines a work week as Monday through Sunday.

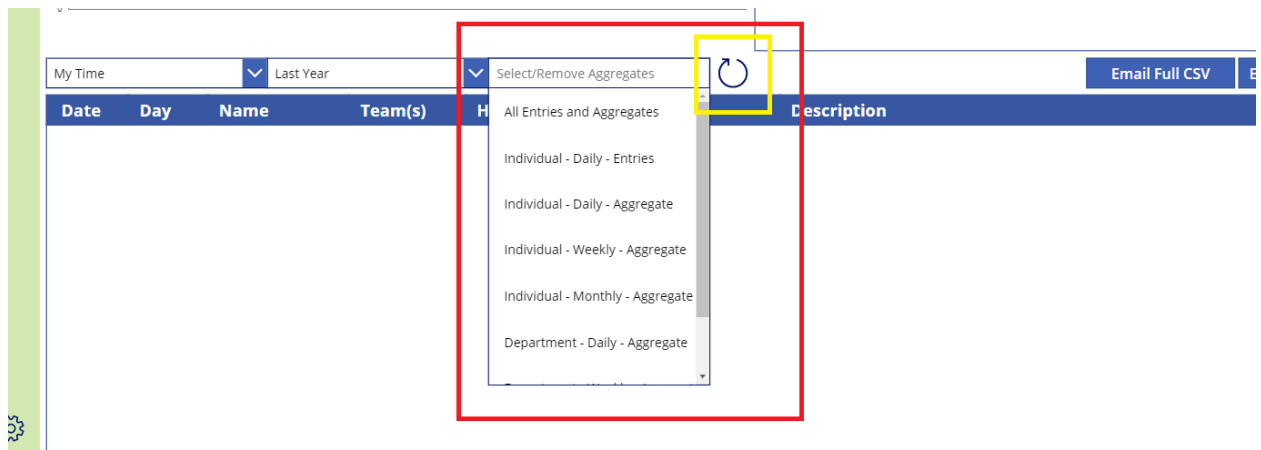
2. Users can filter on their own time



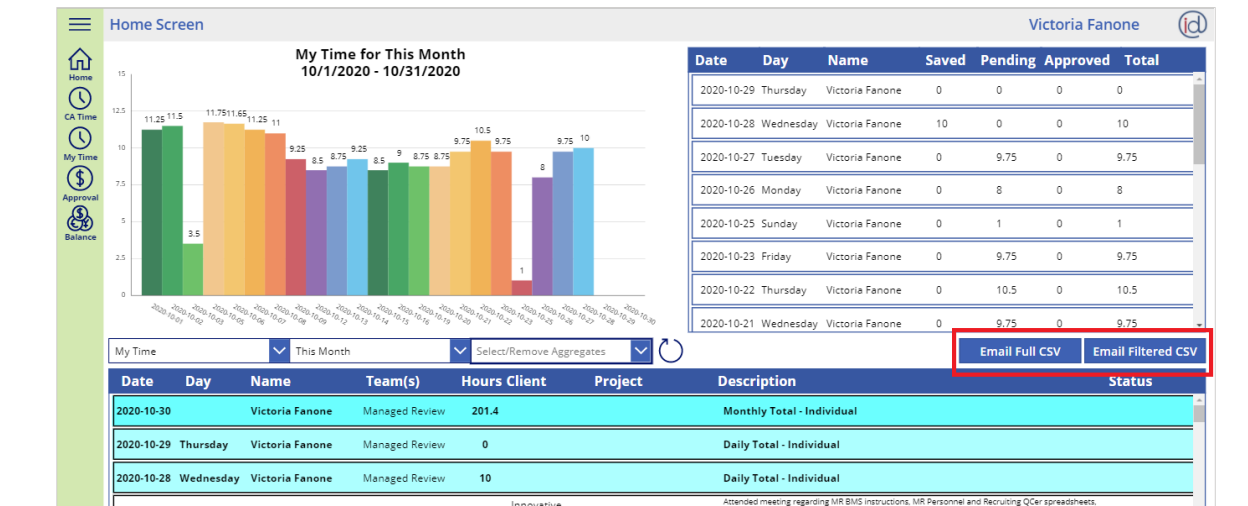
3. In this view, users can also filter on various time intervals such as **Today, Yesterday, This Week, Last Week, This Month, Last Month, This Year, Last Year.**



4. The final filterable selection users can make relates to what results they want to appear in the graph and grid above. These multi-choice options are **All Entries and Aggregates, Individual – Daily – Entries, Individual – Daily – Aggregate, Individual – Weekly - Aggregate, Individual – Monthly – Aggregate.**



5. Once the desired filters/selections are made, users must click the refresh icon directly adjacent to the filter options (highlighted in yellow above) to activate the filters and run the search. Results are displayed in the graph on top of the page, the grid view on the right part of the screen, and in the table right below the filter boxes.



6. Users also have the ability to receive a CSV containing the filtered results via email by selecting the **Email Filtered CSV** (highlighted in red box above).
7. The **Email Full CSV** option sends the user a full CSV report from BMS for all entries by all users for the time period selected in the middle filter box (also highlighted in red box above).