

# How Chargebacks Work for Lexis+ AI Tasks

### PURPOSE

This User Guide will explain how Lexis+ AI subscribers can allocate cost recovery values within LexisNexis Account Insights (LNAI) for Lexis+ AI tasks.

Activity Description	Activity Trigger	Default pricing value (all models)
GENERATIVE AI ASK	All answers related to asking a legal question. These can be within the <b>Ask a</b> <b>legal question</b> task as well as within other tasks (e.g. clicking the <b>Ask a legal</b> <b>question</b> automated follow up button and then asking the question within <b>Generate</b> <b>a draft</b> task)	C\$97.93
GENERATIVE AI DRAFTING	All answers related to drafting. These can be within the <b>Generate a draft</b> task as well as within other tasks (e.g. clicking the <b>Draft a memo based upon this output</b> automated follow up button within the <b>Ask a legal question</b> task)	C\$309.9
GENERATIVE AI SUMMARIZE	All answers related to a case summary request. These can be within the <b>Summarize a case</b> task as well as within other tasks (e.g. clicking the <b>Summarize</b> <b>case law authority</b> automated follow up button within the <b>Ask a legal question</b> task)	C\$309.9
GENERATIVE AI DOCUMENT UPLOAD & SUMMARIZE	All documents that were summarized as a part of the document summary request within <b>Upload documents and ask</b> <b>questions</b> task > <b>Summarize your</b> <b>upload(s)</b> option.	C\$309.9
GENERATIVE AI DOCUMENT UPLOAD & ASK	All answers relating to questions about uploaded documents, as requested under <b>Upload documents and ask questions</b> task > <b>Ask questions about your</b> <b>upload(s)</b> option. All answers relating to follow up questions that were asked within <b>Upload</b> <b>documents and ask questions</b> task > <b>Summarize your upload(s)</b> option.	C\$14.88

## LEXIS+ AI COST RECOVERY CATEGORIES, TRIGGERS, AND PRICING VALUES



## COST RECOVERY IF LEXIS+ AI WAS UNABLE TO PROVIDE AN ADEQUATE ANSWER

If Lexis+ AI was unable to provide you with an adequate answer (for example, the answer begins with the phrasing "We are not confident that we answered your prompt."), the answer provided will not be registered as a chargeback. You may see this activity reported in LNAI as GENERATIVE AI NON-SUPPORTED PROMPT and it will carry a chargeback value of \$0.

### HOW TO CREATE CUSTOM PRICING FOR LEXIS+ AI ACTIVITIES

Custom pricing allows you to create your own price list for the purposes of cost recovery, rather than relying on the values provided by LexisNexis's default pricing models. In LNAI, custom pricing is called **Fixed Rate Allocation**.

- 1. From anywhere within LNAI, click the **Fixed Rate Allocation** tab.
- 2. Click the Create Template button.

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ධ Home මු Reports	Fixed Rate Allocation		Quick Tutorial
I Report Format	Assign a fixed amount or percentage rate to your research activity by class and sub-class	$\sim$	
2 Custom Allocation	Q Search by template name	( 2	+ Create Template
Fixed Rate Allocation	Fixed Rate Template Name	Last Updated  Profile Type	Sha
ាំរី Internal Allocation	LEXIS+ AI PRICING TEST Percentage, Fixed Amount Filters Applied	18-NOV-2024 12:49 PM Shared	Edit 🚦
▲ Threshold Alerts	4		•
🖨 Client Matter			
🔒 Internal Admin			

- 3. Give a name to your **Fixed Rate Template** under the **Name** box. If you want, enter the description of the Fixed Rate Template in the next box.
- 4. Under **Shared Level**, select if you would like this template to be visible to all administrators in your organization (**Shared**) or only to you (**Private**).
  - a. We recommend that you choose the **Shared > Editable** option, because if you are away for whatever reason and the report layout needs to be amended, other users in your organization would be able to go in and make the necessary changes.
- 5. Click Next.

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<ul> <li>Home</li> <li>Reports</li> <li>Report Format</li> </ul>	Create Fixed Rate Template           Image: state and Define         Image: state and Define	
Custom Allocation	Name and Define	Quick Tutorial
<ul> <li>☆ Internal Allocation</li> <li>☆ Threshold Alerts</li> <li>☆ Client Matter</li> <li>ô Internal Admin</li> </ul>	Name Lexis+ AI Text Description (Optional) Add more detail about this template, such as when it should be used	
	Shared Level Private Shared 4 Reset All	5 Cancel Next



6. Because all fields <u>must have</u> some value, we recommend that you first enter the value of <u>100.00%</u> in the **Apply to all listed charges** box and click the **Apply** button.

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Home     Reports     Report Format	Oracle Fixed Rate Template         Image: Straight Content Rates         Image: Straight Content Rates	
Custom Allocation	Assign Template Fixed Rates	() Undo () Quick Tutorial
Fixed Rate Allocation	1 The percentage rate entered should be the desired cost recovery rate. If you wish to recover 25% of the contract gross amount a rate of 25% should be entered	×
A Threshold Alerts	Activity Class	

- 7. To customize the pricing for Lexis+ AI tasks, scroll down to list and click on LEXIS+ GENERATIVE AI > GENERATIVE AI SERVICE.
- 8. Within the **Activity Category** menu, select the specific task for which you want to amend the price.
  - a. To amend the price as a dollar value, select the **dollar sign** box and enter the desired dollar value for all the categories you want to amend.
  - b. To amend the price as a percentage of the default price, select the **percentage sign** box and enter the percent value for all the categories you want to amend.
- 9. Once you have amended the pricing for all the categories you wanted, click Next.

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Reports Report Format  S Custom Allocation  Figure Rate Allocation  S Internal Allocation  A Threshold Alerts	Activity Class       Q. Search Classes       Apply to all listed charges       100.00 *   Apply	Activity Type X Apply to LEXIS+ GENERATIVE Al Individually Search Types of Charge Apply to all listed charges 100.00 Apply	Activity Category X Apply to GENERATIVE AI SERVICE individually Q Search Categories All Apply to all listed charges 100.00 * Apply	
<ul> <li>              Glient Matter          </li> <li>             Mernal Admin         </li> </ul>	HOURLYTIME       \$ 0.00 © x         LIXIS+GENERAT       Mixed Rates         UITIGATION ANA       100.00 % x         LITIGATION PRO       100.00 % x         MEDICAL NAVIG       100.00 % x         PATENT       100.00 % x         PUBLIC RECORD       100.00 % x         Reset All       X	Types of Charges	CENERATIVE ALOCL 100.00 % X GENERATIVE ALORAF 100.00 % X GENERATIVE ALSUMA \$ 25.00 \$ X Bb	9 Incel Next



- 10. If you are looking to completely exclude specific items, you can select them from the list under the **Assign Template Filters** step.
  - a. If yes, select the items you wish to exclude.
  - b. If not, just click **Next**.

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<ul> <li>G Home</li> <li>G Reports</li> <li>I Report Format</li> </ul>	Create Fixed Rate Template	Assign Template Filters     Ø Preview and Save	
Custom Allocation	Template Filters Select a Category	Search for Articluty Description exclude	⑦ Quick Tutorial
1 Internal Allocation	Activity Description Client IDs	ALL Select All: 58 items	Exclude
<ul> <li>Client Matter</li> <li>Internal Admin</li> </ul>	Place of Business Pricing Categories	ALL ALERT SERVICE BRIEF ANALYSIS REPORT ALL C.A.ADMINISTRATIVE DECISIONS	Î.
	Product Names Types of Charges	ALL CA CASE CITATORS	
	User Names	ALL CA CASES	
	Reset All		Cancel Next

11. Finally, if you are happy with all your settings, click the Save button.

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<ul> <li>G Home</li> <li>B Reports</li> </ul>	Create Fixed Rate Template O Name and Define O Assign Content Rates O Assign Template Filters O Preview and Save	
Custom Allocation Fixed Rate Allocation	Preview and Save	Quick Tutorial
ីរីទី Internal Allocation	Classes METHOD FILTERS	
▲ Threshold Alerts ➡ Client Matter	17 of 18 Classes Fixed Amount Percentage Rate Not Applied	(11)
1 Internal Admin		Cancel Save

12. When running the actual report, do not forget to add the Fixed Rate Template under the **Cost Recovery** pod by selecting **Fixed Rate Allocation** under **Select Method** option and then selecting the name of your newly created template.

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A Home	Date Range		🛱 Data Statement
Reports Report Format	Month to date (01-Mar-2025 - 05-Mar-2025) Callet Month February 2025		Data has been processed through 05- MAR-2025. February 2025 billing data is final.
Custom Allocation     Fixed Rate Allocation     fixed Rate Allocation	O Custom Date Range		Partial month data is preliminary until full month data is available.
▲ Threshold Alerts ▲ Client Matter	Cost Recovery	Zero Priced Events ① Include	Custom Allocation Template cannot be applied to data prior to 01-FEB-2024.
🗄 Internal Admin	Select Method () Fixed Rate Allocation	Apply Fixed Rates  None Selected	A report is not a bill. Reports are intended for reporting purposes only
		LEXIS+ AI TEST	Quick Links

13. When you run the report, the new pricing will be displayed under the column **CONTRACT NET AMOUNT**.