

Update your PCLaw® settings!

The new Code of Professional Conduct for B.C. went into effect January 1, 2013

Code of Professional Conduct Changes

The Law Society of British Columbia's new code of professional conduct requires non-cash disbursements to be itemized and displayed in a separate "Other Charges" section on client invoices. Disbursements that do not involve a direct payment to an outside agent are treated as other charges. Upon billing other charges, the transaction(s) must be displayed separately from traditional fees and disbursements:

How to Update Your PCLaw Settings

Note: In PCLaw software, "Other Charges" are known as "Special Fees."

PCLaw® 12 or Higher

1. Enable "Special Fees" in the System Settings:

- Go to the "Options > System Settings > Provincial" tab.
- Click the "Enable Special Fees" checkbox and select "OK."

2. Identify billing templates that need to be edited to include "Other Charges":

- Go to the "Options > System Settings > Billing" tab.
- In the "Default Template" section, note the names of the default templates used by PCLaw. Go to the "Options > System Settings > Billing" tab.

Default Template		Pre-Bill	
Bill	SFDETAIL	Template	SFDETAIL
Quick Bill	QUIKBILL	Frequency	Use Matter Bill Freq

- If your firm uses customized billing templates for specific matters, you may choose to note them for editing.
- Alternatively, you can choose to use the preset default templates ("SFDetail.rbf," "SFPreBill.rbf" or "SF.rbf") and make them the new defaults. You should preview these templates before making them the defaults in your system to ensure that no additional changes are required, or contact a [PCLaw Certified independent Consultant](#) (CIC) for assistance.

3. From the PCLaw "Tools" menu, modify the required billing template(s) to include the additional sections, labels and tokens. If you are unfamiliar with the template editor, contact a [PCLaw Certified independent Consultant](#) (CIC) for assistance.

- The highlighted token in blue must be changed to "Fees less Other Fees Before Discount" or "Fees less Other Fees After Discount." Double-click the token and make the appropriate selection for your firm.
- The items highlighted in green below are the "Text" labels that you need to add.
- The other items are the tokens that you add from the section list. (The token list is displayed on the right side of your screen.)

DATE	DESCRIPTION	HOURS	AMOUNT	LAWYER
MATTER				
MATTER:	Matter #			
RE:	Desc			
Fee Date	Fee Expl	Fee Hrs	Fee Amt	Lwyr Init
MATTER TOTALS:		Hours	TotalBetDisc	
Total Fees		Tot Hrs	Tot Fees-Oth	
OTHER CHARGES				
MATTER:	Matter #			
RE:	Desc			
SP Fee Date	SP Fee Expl		SP Fee Amt	
MATTER TOTALS:			Total	
Total Other Charges			Tot Oth Fees	
GST/HST			Tax on Fees	

4. Modify your explanation codes to allow tracking of “Other Charges”:

- Go to the “Options > Lists > Explanation Codes” tab.
- For each code that will be referred to as “Other Charges,” double-click and enable the “Use Special Fees” checkbox and select “OK.”
- After updating all required explanation codes, select “OK” to save the changes.

PCLaw® 11 or Lower

1. Enable “Special Fees” in the System Settings:

- Go to the “Options > System Settings > Provincial” tab.
- Enable “Use Special Fees for Alberta” from the “Provincial” tab and select “OK” to save the changes.

2. Identify billing templates that need to be edited to include “Other Charges”:

- Go to the “Options > System Settings > Billing” tab.
- In the default template section, note the names of the default templates used by PCLaw.

Default Template		Pre-Bill	
Bill	SFDETAIL	Template	SFDETAIL
Quick Bill	QUIKBILL	Frequency	Use Matter Bill Freq

- If your firm uses customized billing templates for specific matters, you may choose to note them for editing.

3. Modify the required billing template(s) to include the additional sections, labels and tokens. If you are unfamiliar with the template editor, contact a [PCLaw Certified independent Consultant](#) (CIC) for assistance.

- The highlighted token in blue must be changed to “Fees less Other Fees Before Discount” or “Fees less Other Fees After Discount.” Double-click the token and make the appropriate selection for your firm.
- The items highlighted in green below are the “Text” labels that you need to add.
- The other items are the tokens that you add from the section list. (The token list is displayed on the right side of your screen.)

DATE	DESCRIPTION	HOURS	AMOUNT	LAWYER
User Defined Text:				
MATTER RE:	Matter # Desc			
Fee Date	Fee Expl	Fee Hrs	Fee Amt	Lwyr Init
MATTER TOTALS:		Hours	TotalBetDisc	
Total Fees		Tot Hrs	Tot Fees-Oth	
OTHER CHARGES				
MATTER RE:	Matter # Desc			
SP Fee Date	SP Fee Expl		SP Fee Amt	
MATTER TOTALS:			Total	
Total Other Charges			Tot Oth Fees	
GST/HST			Tax on Fees	

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- For each code that will be referred to as “Other Charges,” double-click and enable the “Use Special Fees” checkbox and select “OK.”
- After updating all required explanation codes, select “OK” to save the changes.

