

LEDES 1998B SPECIFICATION

The LEDES™ (Legal Electronic Data Exchange Standard) file format is intended to serve as a standard file format to be used by the legal industry for the electronic exchange of information. Initially, the focus is on billing information.

Background

For many years, corporate law departments have desired to implement task-based billing. Their goal was to perform sophisticated analyses on their legal bills. In lieu of any generally accepted standards, each of several corporations developed its own custom set of task codes and its own custom electronic billing formats which they required their law firms to utilize. While this seemed to meet the corporation's needs, the prospect of law firms having to meet the demands of several such clients, each with its own mutually incompatible code sets and electronic billing format, became a significant barrier to implementation. The situation begged for industry standards.

In 1994 and 1995, a tripartite initiative of the American Bar Association Section of Litigation, the American Corporate Counsel Association, and a sponsoring group of major corporate law departments and law firms coordinated and supported by Price Waterhouse LLP ("Price Waterhouse") developed the Uniform Task Based Management System, a standard set of task, activity, and expense codes for use in the legal industry.

In parallel with the successful UTBMS effort, in 1995, Price Waterhouse convened a consortium of leading legal industry time and billing system and case management system vendors in order to define a standard electronic billing format for use in the legal industry. The consortium approved two format standards for use:

- The ASC X12 EDI standard (the national standard for EDI (Electronic Data Interchange), widely used in several industries)
- A Delimited ASCII standard defined by the consortium

The ASC X12 standard has, to our knowledge, never been used in the legal industry, due largely to its enormous syntactic complexity. At least one custom format, however, was based on the ASC X12 format.

The Delimited ASCII standard has been used, in slightly modified form, by several organizations (e.g., those using the PeerPoint and Data Clearinghouse products). The LEDES format defined herein improves on that Delimited ASCII EDI standard, with the experience of actual implementation efforts considered.

LEDES

The format standard definition process of the 1995 consortium of vendors was successful in that it developed a framework for further discussion. At the time, it was anticipated that discussion within the industry on the standard formats would continue and appropriate revisions would be made as the formats came into broader use. Unfortunately, there were no mechanisms within the legal industry

to maintain, refine and update the format specifications. This limited widespread acceptance and use of the format standards.

In order to correct this deficiency, PricewaterhouseCoopers intends to organize and convene a group of industry representatives to actively update and maintain this format standard. At a minimum, this group will be comprised of representatives from law firms, corporate law departments, industry software vendors, and industry trade groups. While the group will define its own by-laws and policies, we expect that members will serve limited terms to ensure adequate membership turnover. Turnover in composition of the group will ensure that viewpoints are expressed which truly are representative of the industry, as well as preventing any particular member from dominating the proceedings. The group will meet periodically, at least once a year, to refine the format specification and to engage in other related activities that support widespread use of the LEDES format. Until such a group or process is established, PricewaterhouseCoopers will provide informal leadership and information sharing services in this area. Comments on this process should be addressed to the following individuals at PricewaterhouseCoopers:

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Design Criteria

There were five distinct overarching design criteria used in defining the LEDES format:

1. Keep it simple. This is extremely important. Experience of early legal industry attempts at electronic billing clearly show that implementing complex formats meets with limited success. In order for any format to become widely used, it must be as easy to understand and to implement as is possible.
2. Make it unambiguous. While simplicity is a necessity, the terminology describing the format needs to be precise in order for implementation to succeed. Sloppy terminology in specifications causes misunderstandings, so formal standards have to be phrased in extremely precise terminology that is not open to interpretation.
3. Diverge from existing formats as little as absolutely necessary. Any desire to improve upon existing format standards must constantly be weighed against the effort and expense necessary to implement them. Existing formats (and this format) will not be modified unless the resulting benefit clearly outweighs the effort and expense of modifying existing systems to implement the modifications in question.
4. Only ask for information the law firm is typically able to provide from their financial system. If law firms are required to provide any information other than that resident in their

financial system, they will have trouble complying. This would also doom the possibility of financial system vendors producing standard reports that comply with the standard.

5. Meet the needs of corporations, law firms, and legal industry software vendors to the maximum extent possible consistent with the first four criteria. While it is essential that the basic needs of the industry be met, it may be necessary for some corporations to make compromises in the nature of information they seek in order for the entire industry to realize the substantial benefits that uniform use of a widely accepted standard format will bring.

Version

For the purposes of the Version Header Record (see below), this version of the LEDES format is identified as "LEDES1998B". It is the intent of the authors to give later versions of this specification identifiers other than "LEDES1998B", but this intent does not indicate a commitment to produce any future versions of the specification, nor if any are produced, to use any particular numbering scheme.

Following is a schedule of previous versions of LEDES:

LEDES1998A: Released to the public in June, 1998. This version was intended as a draft and was not intended to be utilized by the industry. However, some vendors indicated an intention to implement it, however.

File Specification

Field Delimiter: Fields are delimited by the "|" character (ASCII hex 7C), also known as the "pipe" character. The "|" cannot be used for any purpose other than as field delimiter (i.e., it cannot appear in a text field). In other words, the "|" character must appear *between* any two fields. The "|" symbol must *not* appear after the last field in a record.

Record Delimiter: Records are delimited by the "[" characters (ASCII hex 5B 5D), also known as the "left square bracket" and "right square bracket" characters used in that sequence. The "[" as a pair cannot be used for any purpose other than as record delimiter (i.e., they cannot appear in a text field). A "[" must be immediately followed by a "]" in order to signify a record delimiter. In other words, the "[" characters must appear at the end of any and all records, including the last record in a file.

Carriage Returns/Line Feeds: Carriage Returns and Line Feeds (ASCII hex 0D 0A) in a LEDES file are ignored. For readability, and ease of programming, most applications will probably (but not necessarily) include a carriage return - line feed pair following each record delimiter.

Version Header Record: The first record of all LEDES files must contain a version identifier to indicate conformance with a particular version of this specification (i.e., for this version, "LEDES1998B" would be used). Since future versions are not ruled out, this construct is provided as a means to allow the possibility of automatic version recognition, should it become necessary. Processors may signal an error if they receive files labeled with versions they do not support. To

minimize the possibility of such errors, processors are encouraged to support all versions of this format (i.e., the most current, in addition to all previous).

As an example, the version header record must match the following text exactly:

LEDES1998B[]

The version header record must appear only once in any LEDES file (as the first record).

Field Header Record: The second record of all LEDES files must contain the names of the fields used in subsequent data records in the order that those fields appear in the data records.

The present LEDES format requires that the fields be in a specified order and, therefore, the field header record must match the following text exactly (the "[]" shown represents the record delimiter, as described in the "record delimiter" section of this specification above):

```
INVOICE_DATE|INVOICE_NUMBER|CLIENT_ID|LAW_FIRM_MATTER_ID|INVOICE_TOTAL|BILLING_START_DATE|BILLING_END_DATE|INVOICE_DESCRIPTION|LINE_ITEM_NUMBER|EXP/FEE/INV_ADJ_TYPE|LINE_ITEM_NUMBER_OF_UNITS|LINE_ITEM_ADJUSTMENT_AMOUNT|LINE_ITEM_TOTAL|LINE_ITEM_DATE|LINE_ITEM_TASK_CODE|LINE_ITEM_EXPENSE_CODE|LINE_ITEM_ACTIVITY_CODE|TIMEKEEPER_ID|LINE_ITEM_DESCRIPTION|LAW_FIRM_ID|LINE_ITEM_UNIT_COST|TIMEKEEPER_NAME|TIMEKEEPER_CLASSIFICATION|CLIENT_MATTER_ID|
```

Every record following the field header record is a data record and must comply with the requirements for data records. The field header record must appear only once in any LEDES file (as the second record).

Mandatory Fields

In general, all fields in the specification are mandatory fields (i.e., they must be included in each and every data record in order for the file to be compliant with the LEDES format specification). The only exceptions are situations where the sending application (i.e., usually a law firm financial system) does not track such data (e.g., if a financial system does not have a way of providing an INVOICE_DESCRIPTION, it would leave that field null in all data records; For example, "Field_1_data||Field_3_data" implies that the middle field is null).

Formatting Data Within a Field

Leading and trailing blanks (i.e., "space" characters) in character fields are acceptable.

Date fields must be in the format YYYYMMDD. Only digits 0 to 9 are allowed in date fields.

Numeric fields and currency fields may contain only digits 0 to 9, decimal point ((".")), and dash ("-"). In other words, no "space" characters or any other characters except those mentioned above are allowed in numeric and currency fields. Negative numbers, where permitted, must be indicated with a leading dash. When used, the dash character must be the first character in the field. Field lengths for numeric and currency fields represent the number of digits allowed in the field, to the left and the right of the decimal point. For example, "10.4" indicates a number in the range "-9999999999.9999" to "9999999999.9999". A number specified to the right of the decimal point

indicates the maximum number of decimal places permitted. Leading zeros are acceptable (for negative numbers, however, they must follow the "dash" character).

Adjustment

Adjustments on individual line items are indicated in the LINE_ITEM_ADJUSTMENT_AMOUNT field. For example, if a timekeeper had a billing rate of \$200 per hour and they worked on a matter for two hours, but the client is entitled to a ten percent discount on that person's time, the associated field values (among others) would be as follows:

Field Name	Field Value	Formula
LINE_ITEM_NUMBER_OF_UNITS	"2"	
LINE_ITEM_UNIT_COST	"200"	
LINE_ITEM_ADJUSTMENT_AMOUNT	"-40"	$(2*200*-0.1)$
LINE_ITEM_TOTAL	"360"	$((2*200)-40)$

Invoice-level adjustments must be entered as a line item with the EXP/FEE/INV_ADJ_TYPE indicating either an invoice-level adjustment to fees ("IF") or an invoice-level adjustment to expenses ("IE") and the value for the adjustment entered in the LINE_ITEM_ADJUSTMENT_AMOUNT field. Thus, an invoice-level adjustment of -\$4000 on fees (i.e., an invoice-level discount on fees) would have the following field values (among others):

Field Name	Field Value
EXP/FEE/INV_ADJ_TYPE	"IF"
LINE_ITEM_ADJUSTMENT_AMOUNT	"-4000"
LINE_ITEM_TOTAL	"-4000"

There would usually be a LINE_ITEM_DESCRIPTION accompanying an invoice-level adjustment to explain the reason for the adjustment.

Alternative Billing Arrangements

The legal industry is increasingly moving towards use of alternative billing arrangements. The LEDES format, however, is principally geared towards conventional hourly fees. It is, however, possible, to execute most, if not all, alternative billing arrangements using LEDES.

As an example, if a fixed fee had been agreed to, there are a variety of ways that the LEDES file can be prepared:

- Each time entry might be prepared with a corresponding `LINE_ITEM_ADJUSTMENT_AMOUNT`. The fixed fee would be billed as a single (positive) invoice-level adjustment.
- Each time entry could be charged at the normal rate with an invoice-level adjustment which adjusted the `INVOICE_TOTAL` value to zero, or the fixed fee amount.

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Notes	Type	Max Length	Field Label	Description
1a	Date	8	INVOICE_DATE	The invoice date. A null value ("") would be an error.
	Char	20	INVOICE_NUMBER	The alphanumeric, law firm assigned invoice number or code. Multiple <code>INVOICE_NUMBERS</code> can be billed in the same LEDES file. A null value ("") would be an error.
1b, 2	Char	20	CLIENT_ID	The law firm assigned client code. A null value ("") would be an error.
3	Char	20	LAW_FIRM_MATTER_ID	The law firm assigned matter code. Multiple <code>LAW_FIRM_MATTER_IDS</code> can be billed in the same invoice. A null value ("") would be an error.
1c, 4	Currency	12.4	INVOICE_TOTAL	The sum of all <code>LINE_ITEM_TOTAL</code> values in this invoice. A null value ("") would be an error.
1d	Date	8	BILLING_START_DATE	The starting date for the billing period. A null value ("") would be an error.
1e	Date	8	BILLING_END_DATE	The ending date for the billing period. A null value ("") would be an error.
1f	Char	15 KB	INVOICE_DESCRIPTION	A descriptive summary of work performed which is charged on this invoice during the applicable billing period. Limited to 15KB of text.
	Char	20	LINE_ITEM_NUMBER	The sequence number of this line item. This number must be unique for each line item in an invoice. Usually, the time entry primary key in the law firm's financial system is used here. <code>LINE_ITEM_NUMBERS</code> must be unique per <code>INVOICE_NUMBER</code> but need not be consecutive. A null value ("") would be an error.
	Char	2	EXP/FEE/INV_ADJ_TYPE	An identifier indicating whether the line item is an expense ("E"), a fee ("F"), an invoice-level adjustment on fees ("IF"), or an invoice-level adjustment on expenses ("IE"). A null value ("") would be an error.
	Numeric	10.4	LINE_ITEM_NUMBER_OF_UNITS	The number of units billed on this line item. For fee items, this is the number of hours being billed. For expense items, this is the number of items being expensed. For invoice-level adjustments, this field is ignored. A value of zero "0" or null ("") would be an

Notes	Type	Max Length	Field Label	Description
				error unless the line item is an invoice-level adjustment.
	Currency	10.4	LINE_ITEM_ADJUSTMENT_AMOUNT	The numerical value of any adjustment applied to this line item. A positive value indicates a premium, a negative value indicates a discount. A null ("") or zero ("0") value indicates no adjustment.
5, 6	Currency	10.4	LINE_ITEM_TOTAL	The numerical value of this line item. This must be (LINE_ITEM_UNIT_COST * LINE_ITEM_NUMBER_OF_UNITS) + LINE_ITEM_ADJUSTMENT_AMOUNT. A null value ("") would be an error.
	Date	8	LINE_ITEM_DATE	The date the fees/expenses were incurred. Typically, this date is between the BILLING_START_DATE and the BILLING_END_DATE. A null value ("") would be an error.
	Char	20	LINE_ITEM_TASK_CODE	The task code (e.g., using the UTBMS code set) for this line item. Most expense items probably do not have a LINE_ITEM_TASK_CODE associated with them (in which case this field would be left null).
	Char	20	LINE_ITEM_EXPENSE_CODE	The expense code (e.g., using the UTBMS code set) for this expense line item. Most fee items probably do not have a LINE_ITEM_EXPENSE_CODE associated with them (in which case this field would be left null).
	Char	20	LINE_ITEM_ACTIVITY_CODE	The activity code (e.g., using the UTBMS code set) for this fee line item. Most expense items probably do not have a LINE_ITEM_ACTIVITY_CODE associated with them (in which case this field would be left null).
	Char	20	TIMEKEEPER_ID	A unique identifier for the timekeeper for this line entry. Typically, the identifier used here is the primary key for a timekeeper used in a law firm's financial system (e.g., an employee number, social security number, initials, or anything else so long as it uniquely identifies a particular timekeeper). For fee line items, a null value ("") would be an error. Most expense items probably do not have a TIMEKEEPER_ID associated with them (in which case this field would be left null).
	Char	15 KB	LINE_ITEM_DESCRIPTION	Free form description of this line item. May be up to 15KB of text. If an expense item uses a LINE_ITEM_EXPENSE_CODE, this field is usually left null.
2	Char	20	LAW_FIRM_ID	An identifier uniquely identifying the sending law firm. The law firm's Federal Taxpayer ID must be used if the law firm has one (i.e., at the very least, all law firms operating in the US). A null value ("") would be an error.
	Currency	10.4	LINE_ITEM_UNIT_COST	The standard (i.e., undiscounted) unit cost of the line item. For fees, this would be the hourly rate. For

Notes	Type	Max Length	Field Label	Description
				expenses, this would be the cost per unit. For invoice-level adjustments, this field is ignored. A value of zero ("0") or null ("") would be an error unless the line item is an invoice-level adjustment.
7	Char	30	TIMEKEEPER_NAME	The name of a timekeeper. Names must be entered Last name first, then a comma, followed by First name (e.g., "Arnsley, Robert"). THIS FIELD IS PROVIDED FOR INFORMATION ONLY AND MUST NOT BE USED BY THE RECEIVING APPLICATION AS A PRIMARY KEY FOR TIMEKEEPER. This field is mandatory. Most expense items probably do not have a TIMEKEEPER_NAME associated with them (in which case this field would be left null).
7	Char	10	TIMEKEEPER_CLASSIFICATION	The staff classification of a timekeeper. This field must use one of the following codes: "PT" (for partner), "AS" (for associate), "OC" (for of counsel), "LA" (for legal assistant), or "OT" (for other timekeeper). THIS FIELD IS PROVIDED FOR INFORMATION ONLY AND MUST NOT BE USED BY THE RECEIVING APPLICATION AS A PRIMARY KEY FOR TIMEKEEPER. Most expense items probably do not have a TIMEKEEPER_CLASSIFICATION associated with them (in which case this field would be left null).
3	Char	20	CLIENT_MATTER_ID	The client assigned matter code. Multiple CLIENT_MATTER_IDS can be billed in the same invoice. A null value ("") would be an error, unless the client does not assign matter identifiers.

Notes

1. Several of the fields in the specification contain information which applies to many, if not all, entries in an invoice. This allows the possibility that the sending application might err by having some of the information change from record to record. For example, for each INVOICE_NUMBER, there should be a single INVOICE_DATE, which is repeated on each line item for that invoice. However, since INVOICE_DATE is required to be reported on each line, the possibility exists that the sending application might mistakenly report two or more different INVOICE_DATES for a single INVOICE_NUMBER. While that would clearly be an error, the receiving application must have an unambiguous means of interpreting the information. Therefore, in order to provide that unambiguous interpretation, the following interpretational guidelines are in effect:
 - a. For each INVOICE_NUMBER, only the first INVOICE_DATE appearing for that INVOICE_NUMBER is valid (i.e., all others after the first can be disregarded).

- b. For each LAW_FIRM_MATTER_ID, only the first CLIENT_ID appearing for that LAW_FIRM_MATTER_ID is valid (i.e., all others after the first can be disregarded).
 - c. For each INVOICE_NUMBER, only the first INVOICE_TOTAL appearing for that INVOICE_NUMBER is valid (i.e., all others after the first can be disregarded).
 - d. For each INVOICE_NUMBER, only the first BILLING_START_DATE appearing for that INVOICE_NUMBER is valid (i.e., all others after the first can be disregarded).
 - e. For each INVOICE_NUMBER, only the first BILLING_END_DATE appearing for that INVOICE_NUMBER is valid (i.e., all others after the first can be disregarded).
 - f. For each INVOICE_NUMBER, only the first INVOICE_DESCRIPTION appearing for that INVOICE_NUMBER is valid (i.e., all others after the first can be disregarded).
2. LAW_FIRM_ID and CLIENT_ID are included as fields in order to enable automatic bill routing, should that be desired.
3. LAW_FIRM_MATTER_ID and CLIENT_MATTER_ID are included in order to provide a key for differentiating between various matters being billed. The LAW_FIRM_MATTER_ID is the law firm's key and the CLIENT_MATTER_ID is the client's key. Both must be included, if available. The only situation where CLIENT_MATTER_ID would not be reported by a law firm is if that client does not have its own independent system for identifying matters.
4. Because INVOICE_TOTAL is defined as the sum of the LINE_ITEM_TOTALs for that INVOICE_NUMBER, there exists the possibility that the sending application may make an arithmetic mistake when calculating INVOICE_TOTAL. The receiving application is encouraged to verify that INVOICE_TOTAL is equal to the sum of that Invoice's LINE_ITEM_TOTALs, within a reasonable variance to account for rounding errors that may have been made when the sending application calculated the individual LINE_ITEM_TOTALs. If the INVOICE_TOTAL is not within a reasonable variance (e.g., 1%) of the sum of the LINE_ITEM_TOTALs, there is clearly an error that must be resolved by the sending law firm before payment.
5. The LINE_ITEM_TOTAL is defined as the algebraic result of the following formula:
$$(\text{LINE_ITEM_UNIT_COST} * \text{LINE_ITEM_NUMBER_OF_UNITS}) + \text{LINE_ITEM_ADJUSTMENT_AMOUNT}$$
6. It is sometimes the case that between the sending and receiving system amounts may be rounded differently, or to fewer or more decimal places, than intended by the billing party. The receiving party should make every attempt to round using the same method as the sending party. Realizing that rounding errors will sometimes occur, the sending and receiving parties should mutually agree to an acceptable rounding error below which the sending party will accept payment as complete.

There exists the possibility that the sending application may make an arithmetic mistake when calculating `LINE_ITEM_TOTAL`. The receiving application is encouraged to verify that `LINE_ITEM_TOTAL` is properly calculated, within a reasonable variance to account for rounding errors that may have been made when the sending application calculated it. If the `LINE_ITEM_TOTAL` is not within a reasonable variance (e.g., .1%) of the value specified by the formula above, there is clearly an error that must be resolved by the sending law firm before payment.

7. The `TIMEKEEPER_NAME` and `TIMEKEEPER_CLASSIFICATION` fields are provided for information only. The receiving application must not use these fields as a primary key for timekeeper. Use of these fields is mandatory for fee line items in order to preclude the need for a separate look-up table of timekeeper names and classifications in the receiving application.

Common Errors to Avoid

- Algebraically incorrect `INVOICE_TOTAL` (i.e., `INVOICE_TOTAL` not equal to the sum of the `LINE_ITEM_TOTALS`)
- Algebraically incorrect `LINE_ITEM_TOTALS`
- Invalid dates (e.g., not in `YYYYMMDD` format)
- Invalid header line (e.g., missing fields, improper field names)
- ASCII character 1Ah (i.e., Ctrl-Z) at the end of the file
- Line item number not unique for a given invoice
- Missing `LINE_ITEM_NUMBER_OF_UNITS`
- Missing `LINE_ITEM_UNIT_COST`
- Mandatory fields missing data
- Fields presented in improper order
- No `TIMEKEEPER_ID` listed for fee line items
- Missing fields or too many fields

Other errors may be client specific and should be examined under the rules specified by that client. These errors include such things as `LINE_ITEM_DATE` not within the period covered by `BILLING_START_DATE` and `BILLING_END_DATE`.

LEDES - Sample file

LEDES1998B[]

```
INVOICE_DATE|INVOICE_NUMBER|CLIENT_ID|LAW_FIRM_MATTER_ID|INVOICE_TOTAL|BILLING_START_DATE|BILLING_END_DATE|INVOICE_DESCRIPTION|LINE_ITEM_NUMBER|EXP/FEE/INV_ADJ_TYPE|LINE_ITEM_NUMBER_OF_UNITS|LINE_ITEM_ADJU
```

STMENT_AMOUNT|LINE_ITEM_TOTAL|LINE_ITEM_DATE|LINE_ITEM_TASK_CODE|LI
NE_ITEM_EXPENSE_CODE|LINE_ITEM_ACTIVITY_CODE|TIMEKEEPER_ID|LINE_ITEM
_DESCRIPTION|LAW_FIRM_ID|LINE_ITEM_UNIT_COST|TIMEKEEPER_NAME|TIMEKEE
PER_CLASSIFICATION|CLIENT_MATTER_ID[]

19990225|96542|00711|0528|1684.45|19990101|19990131|For services rendered|1|F|2.00|-
70|630|19990115|L510||A102|22547|Research Attorney's fees, Set off claim|24-
6437381|350|Arnsley, Robert|PT|423-987[]

19990225|96542|00711|0528|1684.45|19990101|19990131|For services
rendered|2|F|2.00|0|700|19990115|L510||A102|22547|Research attorney's fees, Trial pleading|24-
6437381|350|Arnsley, Robert|PT|423-987[]

19990225|96542|00711|0528|1684.45|19990101|19990131|For services
rendered|3|F|0.200|0|40|19990116|L510||A107|45875|Telephone conference with John Doe|24-
6437381|200|Beaster, John|AS|423-987[]

19990225|96542|00711|0528|1684.45|19990101|19990131|For services
rendered|4|E|1|0|24.95|19990117||E111|||Meals|24-6437381|24.95|||423-987[]

19990225|96542|00711|0528|1684.45|19990101|19990131|For services
rendered|5|E|1|0|289.5|19990117||E110|||Out-of_town travel|24-6437381|289.5|||423-987[]

19990225|96542|00711|1326|1250|19990101|19990131|Monthly
Retainer|6|IF|1|1250.|1250|19990131|||Monthly Retainer Fee|24-6437381|||425-936[]

Note: This file contains only eight records terminated by "[]": the version header record, the field header record, and six detail records. Note that Carriage Return - Line Feed pairs are used, but would be completely ignored by the receiving application. In the example, the version header record and the field header record do not have a Carriage Return - Line Feed pair between them (Carriage Returns and Line Feeds are optional and, if used, are ignored).

This sample bills two matters on one invoice. The first matter contains three fee items (the first of which contains a line-item adjustment), and two expense items. The second matter contains only an invoice-level adjustment. Because the adjustment is positive, it is a premium.