

Legal Aid Ontario

# Online billing limits and hard cap notices



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**Title:** Online billing limits and hard cap notices  
**Author:** Lawyer Services & Payments department  
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### **For more information**

For more information please contact Legal Aid Ontario’s Lawyer Service Centre at:

Telephone: (416) 979-9934

Toll Free: 1-866-979-9934

Fax: (416) 979-7326

Email: [pl-lsc@lao.on.ca](mailto:pl-lsc@lao.on.ca)

# Online billing limits and hard cap notices

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## 1. Purpose

The purpose of the job aid is to provide information and instructions on how to review the on-line billing limits and hard cap status information and to manage electronic hard cap notices sent from Lawyer Services & Payments (LSP) through the Solicitor Portal.

## 2. Introduction

Effective May 27, 2012 lawyers will have access to current hard cap status information and will receive hard cap reminder notices electronically through the Solicitor Portal. There are two main components of the on-line hard cap notices:

- Hard Cap Status Information
- Hard Cap Notices

This enhancement to the Solicitor Portal will provide lawyers with immediate access to hard cap status and will eliminate the need for mailing and faxing of hard cap notices.

## 3. Key Features

- The hard cap status information displays all necessary dollar-based hard cap information.
- Lawyers will no longer need to contact LAO to determine hard cap status.
- The hard cap status information is updated daily.
- Tier level increases will be reflected in the hard cap status information the day after the increase is processed.
- The hard cap status information also displays total fees scheduled for payment and total fees under consideration. This additional information will help lawyers better manage accounts submissions within hard cap limits.

- Hard cap notices will be sent through the Solicitor Portal when a lawyer reaches 50% of hard cap. Notices will also be sent at 75%, 90% and 100% of their hard cap.
- Lawyers who have signed up for email and/or text messaging from LAO will receive an email and/or text messages indicating a hard cap notice has been sent.

## 4. Hard Cap Status Information

To access and review the Hard Cap Status Information follow this simple process.

1. Access the Hard Cap Status Information link on the main solicitor portal page.

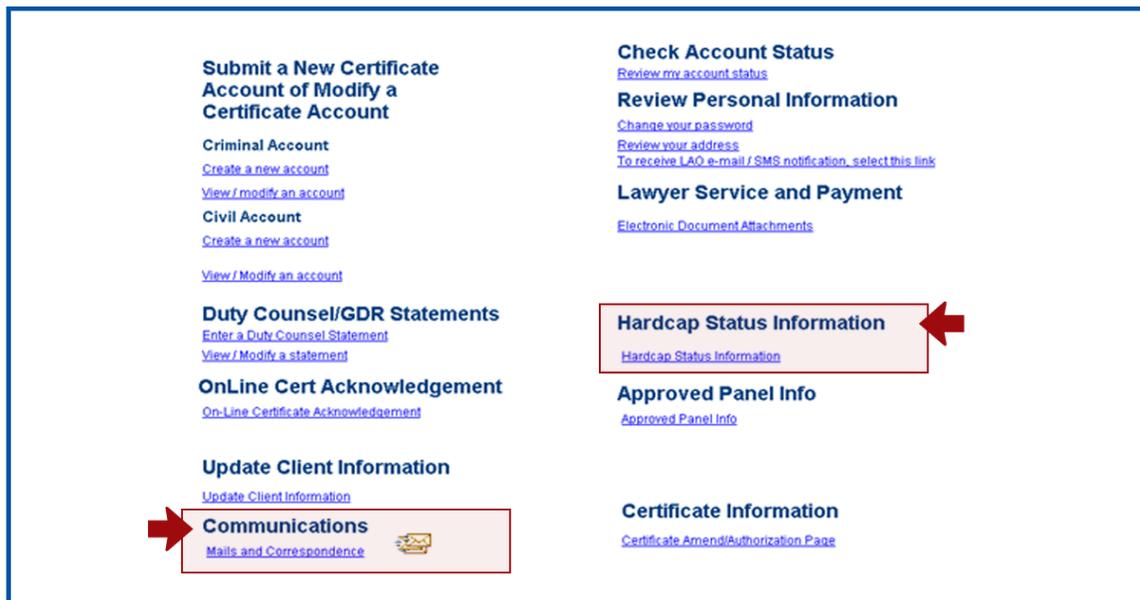


Figure 1: Main solicitor portal page

## 2. Review the hard cap report

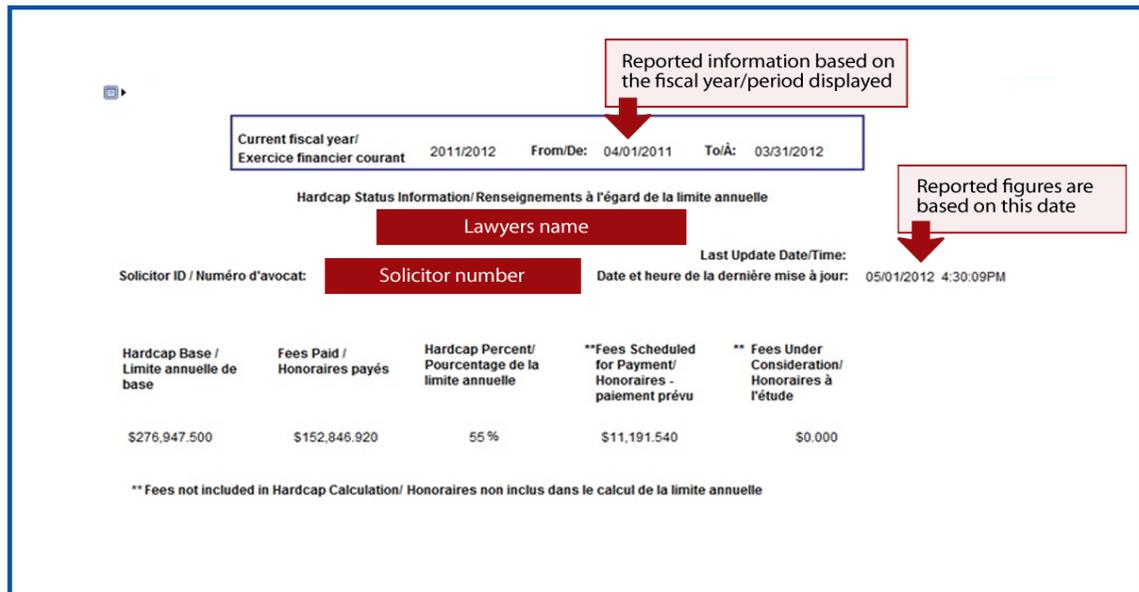


Figure 2: Review the hard cap report

## 3. Identify the percentage of hard cap reached and any pending fees to be paid or processed:

- **Hardcap Base:** The lawyer's annual billing limit (2350 hours X Tier Level Rate)
- **Fees Paid:** Fees matched and paid (funds have been transferred to the lawyer's bank account)
- **Hardcap Percent:** Percentage of hard cap allotment based on fees paid to hard cap base
- **Fees Scheduled for Payment:** Fees matched and not yet paid (\*\*these fees are not included in the hard cap calculation)
- **Fees Under Consideration:** Fees in exceptions and not yet approved for payment (\*\*these fees are not included in the hardcap calculation)

- If a request for exemption is submitted, the amount approved, if any, will be displayed in the report. Two new fields will be displayed in the hard cap report.

Current fiscal year/ Exercice financier courant		2011/2012	From/De:	04/01/2011	To/À:	03/31/2012
Hardcap Status Information/Renseignements à l'égard de la limite annuelle						
<b>Lawyers name</b>						
Last Update Date/Time:						
Solicitor ID / Numéro d'avocat:	<b>Solicitor number</b>		Date et heure de la dernière mise à jour:	04/16/2012 3:17:44PM		
Hardcap Base / Limite annuelle de base	Hardcap Exemption/ Exemption de la limite annuelle	Hardcap Total / Limite annuelle totale	Fees Paid / Honoraires payés	Hardcap Percent/ Pourcentage de la limite annuelle	** Fees Scheduled for Payment/ Honoraires - paiement prévu	** Fees Under Consideration/ Honoraires à l'étude
\$211,006.500	\$5,000.00	\$216,006.500	\$147,817.620	68%	\$0.000	\$0.000
** Fees not included in Hardcap Calculation/ Honoraires non inclus dans le calcul de la limite annuelle						

Figure 3: Two new fields will be displayed

- Hard Cap Exemption: The additional fees a lawyer is allowed to be paid in excess of the hard cap base
- Hard Cap Total: The revised annual billing limit (Based + Exemptions)
- Hard Cap Percentage: The revised hard cap percentage based on the new Hard Cap Total

#### Important notice

The Hard Cap Status Information is available to view until 4:00 p.m. on the last business working day of that fiscal year. On April 1<sup>st</sup> the information is cleared for the new fiscal year. If a permanent record for the previous fiscal year is required, lawyers should print the screen or save a screen before 4:00 p.m. on the last business day of that fiscal year.

## 5. Hard Cap Notices

1. At 50/75/90/100% of hard cap, there is a pop up message when logging into the Solicitor Portal. Click the 'OK' button to continue to the next page.

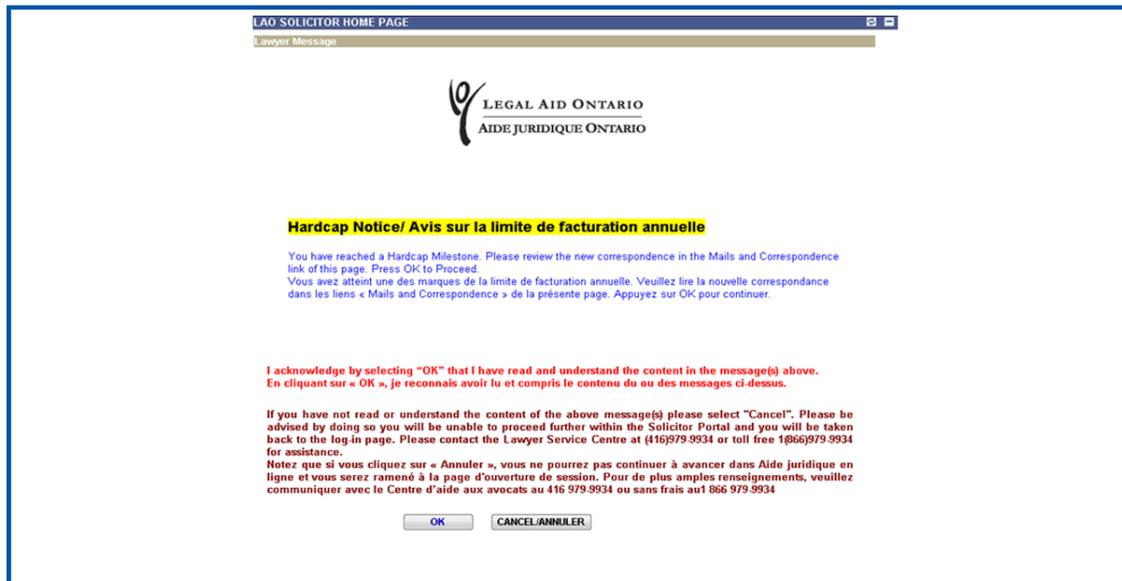


Figure 4: Pop up message

2. To access the hard cap notices, select the "Mail and Correspondence" link under *Communications* on the main solicitor portal page.



Figure 5: Mail and correspondence link

3. The LAO Messaging System opens and a new Hard Cap Notice mail folder is available.

- If there is a message indicating there is a Hard Cap Notice, click on the link.

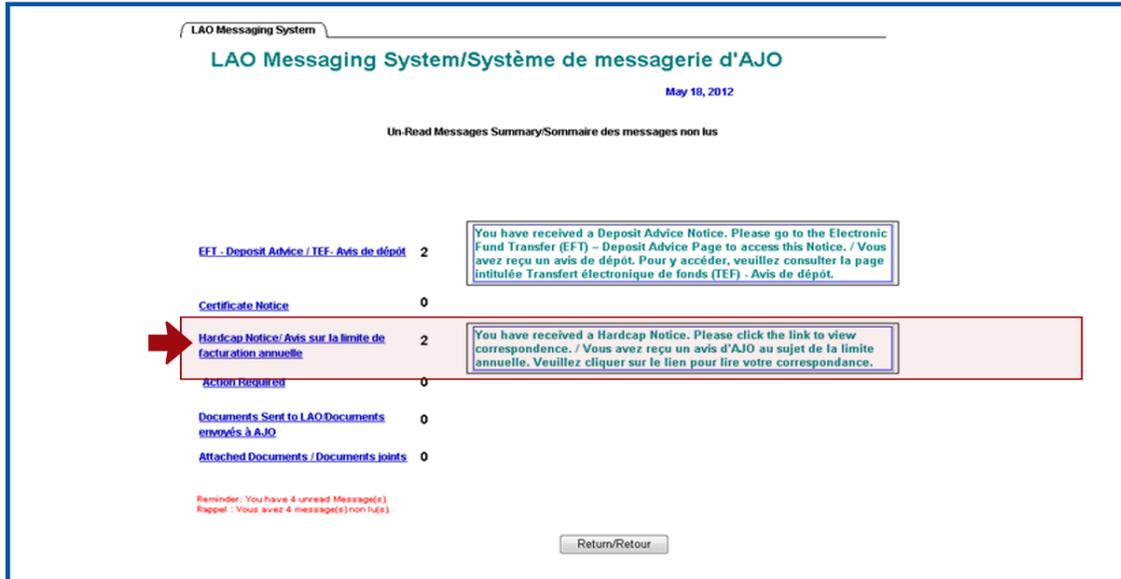


Figure 6: Click the link for the hard cap notice

- Click on the highlighted LAO Hard Cap Notice Update from the list of notices. This opens the notice advising of the hard cap milestone/status (50% of hard cap, 75%, 90%, 100%)

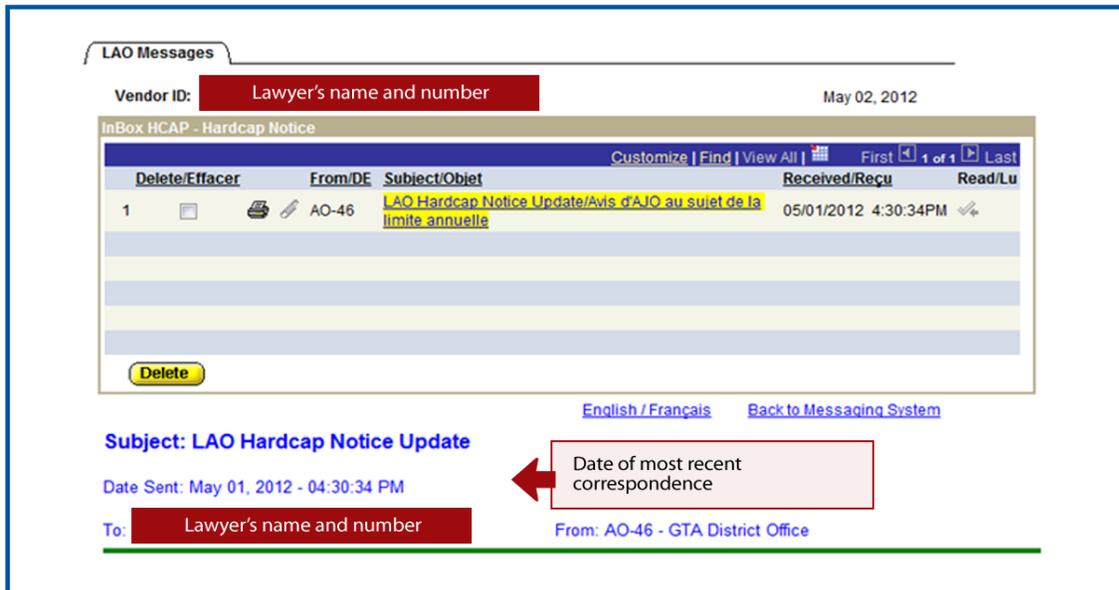


Figure 7: Click on the highlighted hard cap notice update from the list of notices

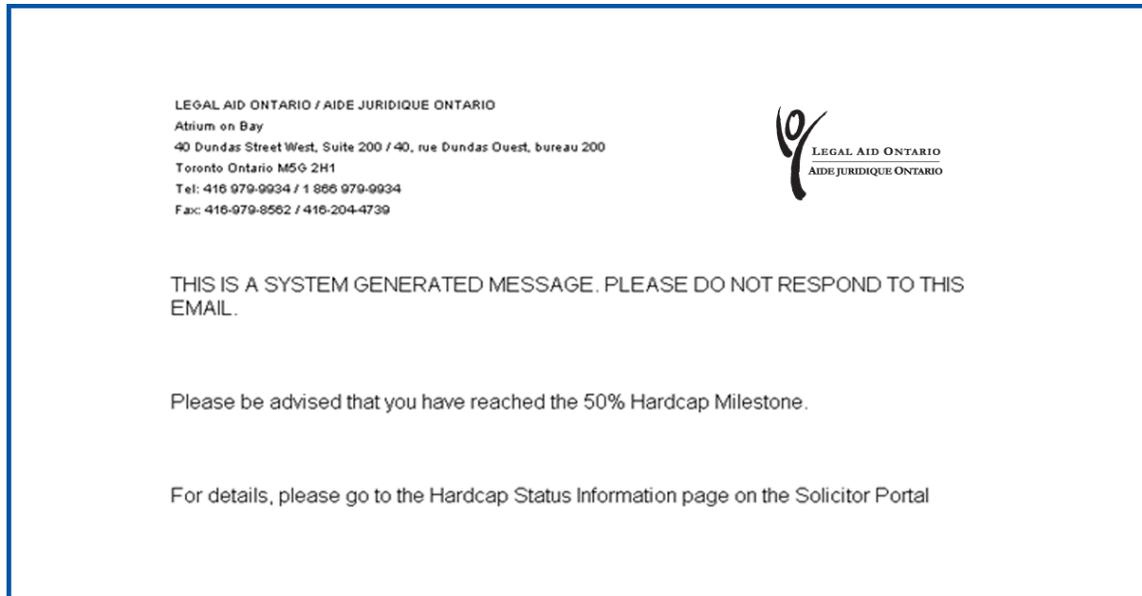


Figure 8: Sample message

6. The functionality is similar to other LAO portal notices and the notice can be left in the list of notices, printed, or deleted.
7. Emails and text messages are also sent to those who have signed up for these e-messages

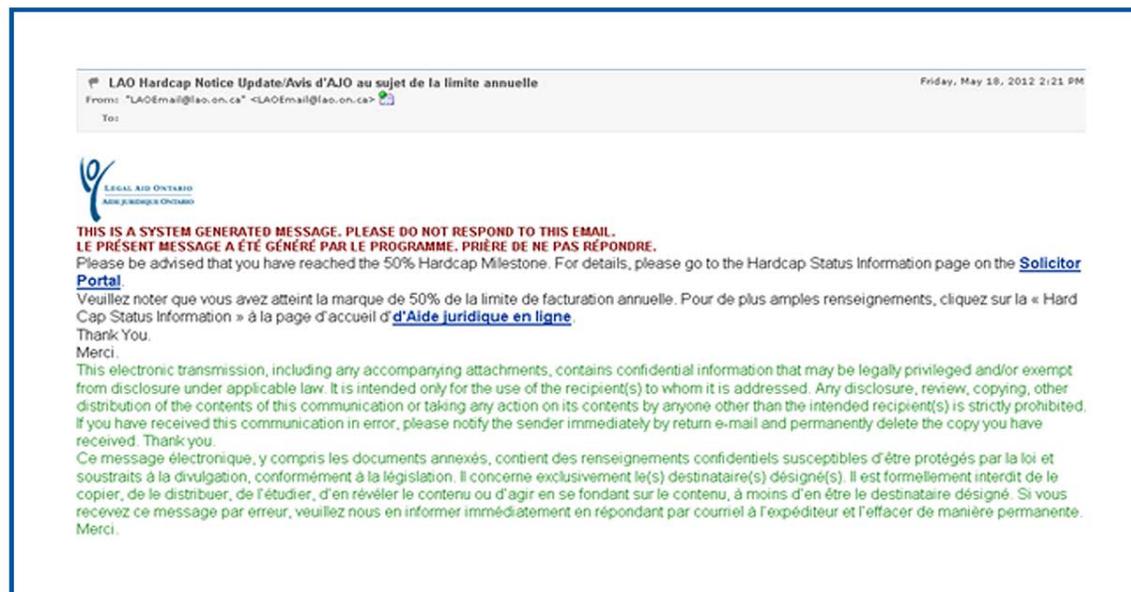


Figure 9: Email sample

```
----- SMS -----  
From: +14162941217  
Received: Apr 13, 2012 10:21 AM  
Subject: You have reached the 75% Hardcap...  
  
You have reached the 75% Hardcap Milestone.  
Please No Reply.  
Vous avez franchi la marque de 75%  
Ne pas repondre.  
-----
```

Figure 10: Text message sample