



CHECKLIST

# UTBMS and ABA Codes Implementation Checklist



*Use this practical checklist to successfully integrate Uniform Task-Based Management System (UTBMS) and American Bar Association (ABA) codes into your law firm's daily workflow.*



## Phase 1:

# Preparation and Understanding

- Review** the official UTBMS and ABA code sets that apply to your firm's specific practice areas.
- Identify** the specific billing requirements and guidelines of your major clients.
- Map** your firm's current timekeeping descriptions to the standard UTBMS phases, tasks, and activity codes.
- Establish** internal policies for handling ambiguous time entries that do not fit perfectly into one code category.



## Phase 2: System Integration

- Update** your legal billing and timekeeping software to include the required UTBMS and ABA code sets.
- Configure** required fields in your software to prompt fee earners for task and activity codes before they can save a time entry.
- Test** a sample invoice generation to ensure the assigned codes map correctly to standard LEDES billing formats.
- Automate** code validation rules within your software to catch mismatched or missing codes before invoices go to clients.



## Phase 3: Staff Training

- Develop** a quick-reference guide tailored to your firm's most frequently used task and activity codes.
- Schedule** mandatory training sessions for all attorneys, paralegals, and support staff on proper code selection.
- Demonstrate** how to write clear, concise block-free narrative descriptions that match the selected codes.
- Train** your billing department on how to identify and troubleshoot common coding errors.



## Phase 4:

# Review and Compliance

- Audit** initial time entries weekly during the first month of implementation to catch and correct errors early.
- Designate** a point person in the billing department to handle questions about complex code scenarios.
- Analyze** any client invoice rejections or write-downs to identify and fix recurring coding mistakes.
- Schedule** a quarterly review of client billing guidelines to ensure your firm maintains strict compliance with changing expectations.

## You shouldn't have to manage this manually.

Reference guides help, but they don't scale. AI-native legal ops platforms automatically validate UTBMS and ADA codes, flag inconsistencies, and enforce billing guidelines in real time so your team can focus on higher-value work.



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