

Legal Timekeeping Software Buyer's Checklist

A weighted scorecard and vendor-neutral checklist for comparing timekeeping tools on capture, integrations, review, billing codes, security and reporting

MIRA · miranow.ai · Updated October 2026

8

Weighted evaluation areas

100

Total weight points across all areas

1 to 5

Score per area before weighting

1

Weighted scoring table

Area	Weight	What to score	Vendor A	Vendor B	Vendor C
↗ Click to open the full scorecard (full screen)					
Full-size infographic · free PDF below					
Entry review workflow	15	Edit, merge, split, exclude, approve before release			
Billing codes and e-billing	10	UTBMS codes, client guidelines, LEDES path			
Security and privacy	15	SSO, encryption, residency, audit reports, AI data use			
Admin and reporting	10	Adoption, unreleased drafts, WIP, exports			
Adoption and support	5	Training, onboarding, support hours, change effort			
Cost and contract	5	Price per user, minimums, term, exit and data return			
Total	100	Sum of weighted scores			

Weighted score = weight x (score / 5). Example: weight 20, score 4 gives 16. A perfect vendor scores 100. Adjust weights to your firm before scoring.

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Capture methods and integrations

- ☐ Captures email activity from Outlook (sent and received, per thread)

☐ Captures Outlook calendar meetings with attendees

☐ Captures Microsoft Teams meetings and calls

☐ Captures document activity in your DMS (iManage Work or NetDocuments)

☐ Captures OneDrive or SharePoint file activity

☐ Captures browser research you allow, with personal sites excluded
- ☐ Offers a manual timer and manual entry for work with no digital trace

☐ Offers a mobile app for court, travel and calls

☐ Maps activity to client and matter from your matter list

☐ Syncs the matter list from your billing or practice management system

☐ Releases approved entries to your billing system without re-keying

☐ Supports on-premises or private connectivity if your billing system is hosted in-house

3 Entry review and billing codes

- ☐ Every captured item stays a draft until a person approves it
- ☐ Lawyers can edit, merge, split and exclude drafts
- ☐ Assistants or delegates can prepare entries for a lawyer to approve
- ☐ Supports 0.1-hour increments and your firm's rounding rule
- ☐ Suggests or enforces UTBMS task and activity codes where clients require them
- ☐ Flags block billing and vague narratives before release
- ☐ Applies client outside counsel guidelines per matter
- ☐ Produces data your billing system can export as LEDES 1998B or LEDES XML
- ☐ Keeps an audit trail of who changed and released each entry

4 Security and privacy

- ☐ Single sign-on via SAML 2.0 or OpenID Connect with your identity provider
- ☐ Multi-factor authentication enforced through SSO
- ☐ User provisioning and removal via SCIM or your directory
- ☐ Encryption in transit (TLS 1.2 or later) and at rest
- ☐ Choice of data storage region to meet residency needs
- ☐ Current SOC 2 Type II report or ISO/IEC 27001 certificate
- ☐ Published list of subprocessors, including any AI model provider
- ☐ Written terms on whether firm data is used to train AI models
- ☐ Configurable retention and deletion of raw activity data
- ☐ Respects ethical walls and matter-level access restrictions
- ☐ Clear statement on screen capture and keystroke logging
- ☐ Admin audit logs available for export

5 Admin and reporting views to request in the demo

Captured vs released

Hours captured as drafts against hours released, per timekeeper.

Draft aging

How long drafts sit before release, and who has a backlog.

Entry lag

Days between the work date and the entry date.

Matter WIP

Unbilled time per matter before the pre-bill run.

Adoption

Active reviewers per week and users who have not logged in.

Data export

Full export of entries and audit history in an open format.

6 Run a fair pilot

- 1 Set a baseline**
Record current hours per timekeeper, entry lag and pre-bill edits for 4 weeks.
- 2 Pick a mixed group**
Include partners, associates and an assistant from at least two practice groups.
- 3 Connect real systems**
Use your live email, calendar, DMS and a test billing feed.
- 4 Train the review habit**
Ask users to review drafts daily for the pilot period.
- 5 Compare the numbers**
Measure the same metrics against the baseline after 4 to 6 weeks.
- 6 Score and decide**
Fill in the weighted table with pilot evidence, then check references.

7 Buying traps

Do

- ✓ Ask for the security documents before the pilot starts
- ✓ Test with your real DMS and billing system
- ✓ Include billing staff and IT in scoring
- ✓ Get data export and exit terms in writing

Avoid

- ✗ Score from a scripted demo alone
- ✗ Accept any tool that releases time without approval
- ✗ Assume every integration listed is two-way
- ✗ Skip the privacy review for staff monitoring concerns

8 How MIRA answers this checklist

MIRA captures work from iManage Work, Outlook Calendar, OneDrive and Chrome, with review inside Microsoft Teams and AI-assisted task codes. Approved entries release to billing systems including Elite, Aderant, MATTEROOM, Juris, Clio, MyCase, Centerbase, LeanLaw, SurePoint and Tabs3. MIRALink supports private and on-premises connectivity.

Sources and references: ABA Model Rule 1.1, Comment 8 (technology competence); ABA Model Rule 1.6(c) (reasonable efforts to protect client information); ABA Formal Opinion 477R (Securing Communication of Protected Client Information, 2017); UTBMS Code Sets (ABA and LEDES Oversight Committee); LEDES e-billing formats (LEDES Oversight Committee); NIST SP 800-63B (Digital Identity Guidelines: Authentication); AICPA SOC 2; ISO/IEC 27001.

General information, not legal advice. Check your jurisdiction's rules and your client billing guidelines.

MIRA

www.miranow.ai/solutions/legal-timekeeping-software-for-lawyers