FREE CHECKLIST

Legal Timekeeping Best Practices Checklist

Daily, weekly and billing-cycle routines, rounding rules, entry quality, pre-bill review and the items a firm timekeeping policy should cover

MIRA · miranow.ai · Updated October 2026

Same day
When each entry should be recorded and reviewed

0.1 hr
Six minutes in a tenth-of-an-hour system

3 parts
Action + subject + purpose in every narrative

100%
Entries reviewed by the timekeeper before release

1 Contemporaneous recording rhythm

⤢ Click to open the full checklist (full screen)

Full-size infographic · free PDF below

3 Before lunch
Catch short calls, emails and document edits from the morning.

4 End of day
Compare entries with calendar, sent mail, documents and calls.

5 Before cycle close
Finish drafts and release complete entries before the billing cutoff.

2 Daily: before you log off

- [ ] Every matter worked on today has an entry
- [ ] Entries match calendar events that actually took place
- [ ] Sent email and substantive messages were reviewed
- [ ] Short calls and quick reviews were captured
- [ ] Document drafting and revisions were captured
- [ ] Research sessions were recorded
- [ ] Work outside normal hours was considered
- [ ] Running timers were stopped and corrected
- [ ] Each entry sits on the correct client and matter
- [ ] Durations reflect actual time and the right increment
- [ ] Narratives name the action, subject and purpose
- [ ] Required task and activity codes were added
- [ ] Billable and non-billable work were classified
- [ ] Duplicates were removed and entries saved or submitted

3 Weekly: timekeeper and supervisor review

- [ ] No missing or unusually low timekeeper days
- [ ] Late entries identified and completed
- [ ] Unreleased drafts finalized or deleted
- [ ] Rejected entries corrected and resubmitted
- [ ] Matter corrections reviewed for patterns
- [ ] Vague narratives rewritten
- [ ] Billing code corrections reviewed
- [ ] Client guideline exceptions flagged
- [ ] Integration or sync failures resolved
- [ ] Training or support needs noted

4 Monthly: billing-cycle close

- [ ] All time for the period released before the cutoff
- [ ] Unbilled time listed by matter and timekeeper
- [ ] Pre-bills sent to responsible lawyers with a return date
- [ ] Rates checked against client rate agreements
- [ ] Entries checked against outside counsel guidelines
- [ ] Block-billed entries split where the client requires
- [ ] Time on closed or inactive matters reviewed
- [ ] Write-downs recorded with a reason
- [ ] Matter totals compared with budgets or estimates
- [ ] Late-entry and correction metrics reviewed

5 Rounding rules to set in writing

Rule	What the policy should state
Default increment	0.1 hour (6 minutes) or another unit the firm adopts
Rounding method	Round up to the next unit, or to the nearest unit
Client overrides	Client increments and rules replace the firm default
Minimum charges	Whether any minimum per entry is allowed, and only if agreed
Short tasks	How related short tasks on one matter are combined
Timers	Timer totals are reviewed and corrected before release
Actual time	Record actual time first; apply the increment second
Ethics limit	Bill only time actually spent (ABA Formal Opinion 93-379)

Rounding must stay consistent with the engagement agreement and what the client was told about billing.

6 Entry quality

Do

- ✓ Write action + subject + purpose
- ✓ Name the document, issue, meeting or research topic
- ✓ Use one entry per distinct task where clients prohibit block billing
- ✓ Match the task and activity code to the narrative
- ✓ Keep narratives clear and free of privileged strategy
- ✓ Record non-billable work with the same care

Avoid

- ✗ Use 'attention to file', 'research' or 'emails' alone
- ✗ Copy calendar titles or document names without review
- ✗ Reconstruct a week of time from memory
- ✗ Repeat identical narratives across days
- ✗ Include settlement limits or sensitive personal data
- ✗ Assume every captured activity is billable

7 Pre-bill review: who checks what

Check	Usually done by	Fix before the invoice
Correct client and matter	Timekeeper	Move entry to the right matter
Duration and increment	Timekeeper	Correct to actual time and policy
Narrative clarity	Timekeeper, reviewing lawyer	Rewrite vague or bundled entries
Codes and client rules	Billing team	Apply required codes; flag restricted tasks
Duplicates and staffing	Reviewing lawyer	Remove duplicate attendance or repeated work
Confidential detail	Reviewing lawyer	Trim strategy and sensitive data
Rates and budget	Billing team	Confirm rates; note budget overruns
Write-downs	Responsible lawyer	Record amount and reason

8 What a firm timekeeping policy should include

- [ ] Deadline for entering time (for example, same day)
- [ ] Activities that must be recorded, billable and non-billable
- [ ] How non-billable time is classified
- [ ] Default billing increment and rounding method
- [ ] Narrative standard with approved examples
- [ ] When tasks must be separated
- [ ] How task and activity codes are selected
- [ ] Where client billing guidelines are kept and how they apply
- [ ] Who reviews incomplete or late entries
- [ ] How corrections and write-downs are recorded
- [ ] How confidential information is kept out of narratives
- [ ] Consequences of late submission
- [ ] Rules for software that captures activity
- [ ] Training for new timekeepers and refreshers

9 Where MIRA fits

MIRA captures work activity from connected tools such as Outlook Calendar, Microsoft OneDrive and iManage Work, presents it for review inside Microsoft Teams and can suggest descriptions and task or activity codes. Timekeepers edit, merge, save or release each entry. MIRA does not replace a billing or practice management platform.

Sources and references: ABA Formal Opinion 93-379 (Billing for Professional Fees, Disbursements and Other Expenses); ABA Model Rule 1.5 (Fees); ABA Model Rule 1.6 (Confidentiality of Information); UTBMS task and activity code sets.
General information, not legal advice. Check your jurisdiction's rules and your client billing guidelines.

MIRA
www.miranow.ai/resources/legal-timekeeping-best-practices