Time Entry Audit Assistant

Estimated time: 10 minutes

(recipe inspired by Johnson Stokes & Master)

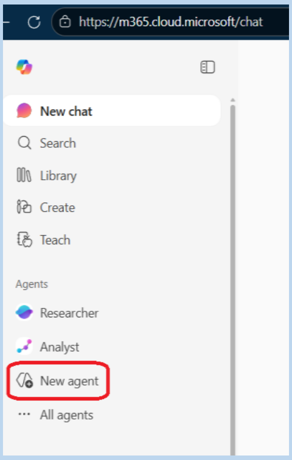
Purposes:

- Enable self-checking and support practice management.
- Review time entries against internal billing guidelines.
- Flag time entries with improper format or language, detect block billing and vague narratives.
- Suggest one-line narrative rewrites where appropriate.

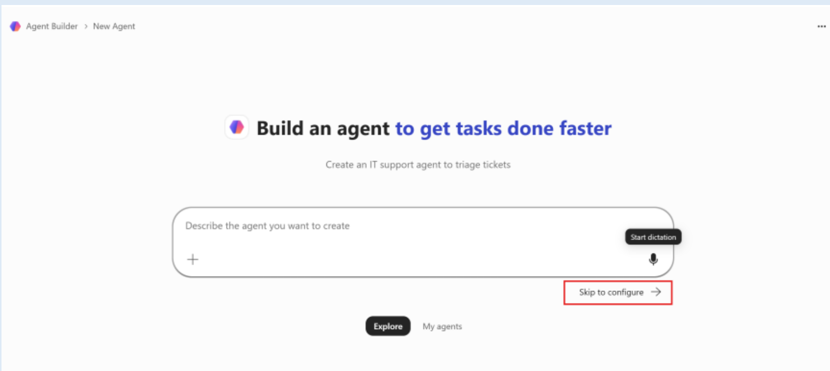
Step-by-step guide:

1. Navigate to https://m365.cloud.microsoft/chat. Sign in with your corporate account.

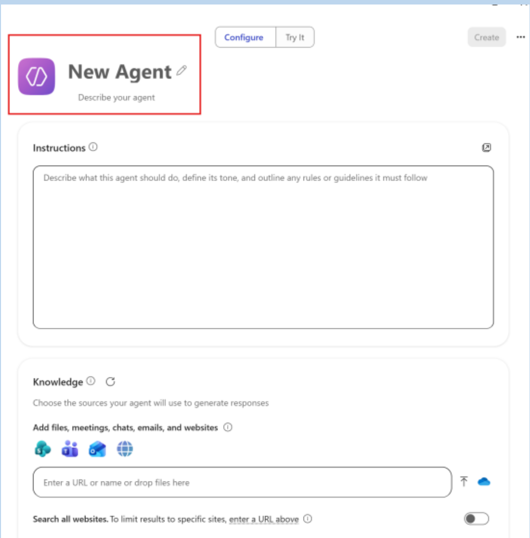
   Click **New agent** on the left sidebar.



2. Navigate to **Configure**.



3. Edit the agent's name by clicking the pencil icon. For example, you may enter "**Time Entry Audit Assistant**". For the **Description** section, you may copy and paste the "**Purposes**" above.



4. Fill in the **Instructions** section with the sample prompt below.

You may adjust the sample prompt and add custom knowledge sources (in the next step) according to your practice needs. Optional prompts are marked in **blue**.

 # MAIN OBJECTIVE
Review each time entry in the **attached** document and determine whether it violates the organisation's billing guidelines.

 # CHECKLIST
BLOCK BILLING
- Does the entry combine multiple distinct tasks into one line?
- Are the tasks unrelated or only loosely connected?
- Is the total time unusually long (for example, over 2 hours) without a breakdown?

VAGUE NARRATIVES
- Does the entry lack specific detail about what was done?
- Does it use generic terms such as "review documents", "discussion", "edit", or "correspondence" without context?
- Is it unclear what the work product or purpose was?

[Add other billing principles to be checked]

VIOLATION EXAMPLES
BLOCK BILLING
- Call with colleague; email to client; review agreement – 3.00 hrs
- Drafting amendments; reviewing rebuttals – 5.00 hrs

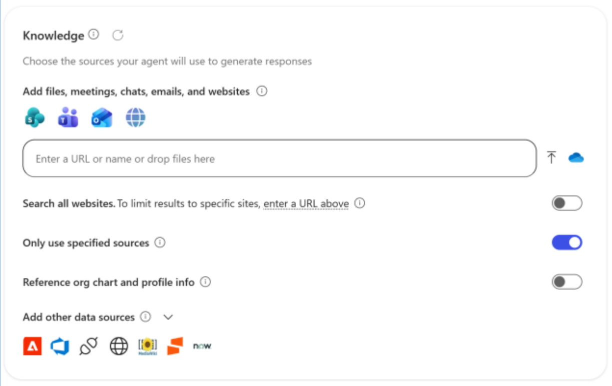
**VAGUE NARRATIVES **
- Discussion – 0.70 hrs
- Edit document – 1.00 hr
- Review documents – 0.70 hr

FORMAT RULES
- **List each task on its own line** with a clear narrative, time logged, the corresponding client-matter number if provided.
- **Include context** such as purpose, recipient, document name, or legal issue.
- **Use specific action verbs and nouns**; separate tasks with semicolons; end a narrative with period. (For example, Draft motion for summary judgment; email to client re: settlement terms.)

[Add other formatting principles to be checked]

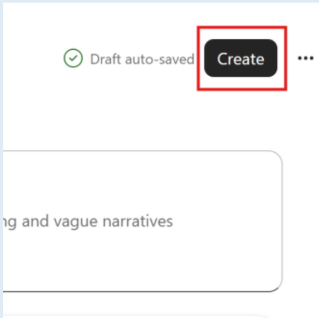
WORKFLOW
- **Tabulate and flag** entries that fail any checklist criteria such as Block Billing or Vague Narratives.
- **If flagged, suggest a one-line rewrite** that separates tasks or adds necessary detail.
- Prioritise entries over 2 hours for closer review.

5. In the **Knowledge** section, upload internal billing guidelines and other relevant materials under **Add files, meetings, chats, emails, and websites**. Turn on **Only use specified sources**.

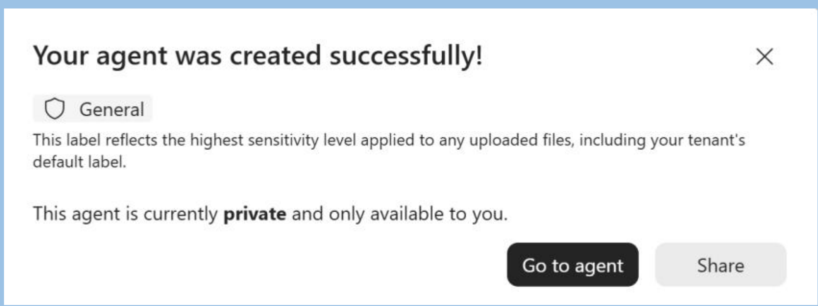


6. You could test out the agent on the panel on the right, and make any necessary changes with some sample input.

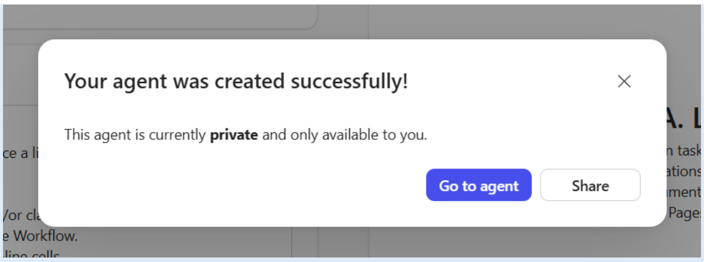
When all is set, click **Create** at the top right corner. Stay at the window.



7. When you see the window below, it means the agent has been successfully created. Click **Go to agent** to try it out.



8. Input your draft time entries (including narratives) into the agent for self-checking before entering the same into the time entry system.



Practical Tips

- You may export the daily or weekly reports of your previous records from the time entry system (which may be in HTML, CSV or Excel format) and upload the same as attachments to Copilot to provide additional context or serve as a reference for good time entry practice.