



A SIMPLE 2-STEP YEAR-END BILLING PREPARATION PROCESS

HERE'S A CLEAN, EASY-TO-FOLLOW PROCESS YOUR OFFICE CAN USE EVERY DECEMBER TO WRAP UP YOUR YEAR WITH TXDOCSPLUS

STEP 1: REVIEW BILLING REPORTS TO IDENTIFY DELINQUENT CLIENTS & OUTSTANDING WORK

TXdocsPlus includes a library of reports you can use to monitor timeslips and expense slips, check for unbilled casework, view trust status, and more.

Helpful for year-end billing is the ability to see:

- Which clients have unpaid balances
- What work & expenses haven't been billed
- Which cases have stalled or require a status update

To generate a report, [Practice Management > Billing Manager > Billing Reports](#)

Check the status of your cases with these reports

Case Status

Unbilled Cases

Unbilled Hours

STEP 2: UTILIZE "BILL TO DATE" TO FOCUS ON YOUR DESIRED BILLING PERIOD

Use the "Bill To" feature to generate complete invoices through December 31st. This ensures every hour and expense for the year is included.

The "Bill to Date" option allows you to **exclude new time and expense slips created after the new year.**

For consistency purposes and to avoid confusion, we suggest **making the statement date the same as the "Bill To Date."** (See the image to the right.)

Individual Statement

Client: Justice M Powers

Case: Divorce

Retainer/Trust: \$4,268.00

Due date: 12/31/2025

☒ Bill To Date 12/31/2025

			Divorce
12/03/25	4,268.00	Client Funds de	

☒ Make statement date same as "Bill To Date"