WESTERN CONFERENCE OF TEAMSTERS
LEGAL SERVICES TRUST FUND
P.O. Box 2340 | Stockton, CA 95201 | (209) 940-5250

To: Participating Panel Attorneys

Subject: Western Conference of Teamsters Legal Services Trust Fund
Updated Panel Attorney Agreement

The Board of Trustees of the Western Conference of Teamsters Legal Services Trust Fund has recently updated the Panel Attorney agreement. Please read over the attached agreement and submit a signed copy to our office at your earliest convenience. The agreement can be faxed, emailed, or mailed. Each individual attorney needs to have their own signed agreement.

The Board of Trustees decided to update the agreement due to key issues that seem to be repeatedly occurring such as:

- Attorneys billing for dates of service that occur before the date a claim was issued. **No work** should be completed until a claim number has been issued by our office.
- Attorneys failing to keep copies of filing fee receipts and claim forms.
- Claims being worked on by attorneys who have not signed an agreement and have not been approved by the Board of Trustees. Once an attorney is approved by the Board of Trustees, the approval applies to that attorney only, not the firm the attorney works for.

Each individual attorney that has been approved by the Board of Trustees must sign and submit a copy of this updated agreement. Effective May 15, 2013, billing statements will only be processed if the billing **clearly states** which approved attorney completed work on the claim and there is a signed copy of their Panel Attorney Agreement on file. Once a signed copy of the agreement is received by our office, we will sign the agreement as well and return a copy back to you. A copy of this agreement must be kept in your office. When an audit is conducted at your office the auditor will request to see a copy of this agreement.

Due to the amount of billing statements our office has been receiving, a second check run has been added. Any invoices received by the close of business of the last day of the month will have a check issued on the 5th of the following month. Any invoices received by the close of business on the 14th of the month will still be issued payment on the 20th. All invoices or billing statements can be submitted via mail, fax (209-940-5251), or email (LST@deltafund.com).

Please note the following when submitting your invoices and billing statements:

- Filing/server fees need to be issued a separate claim number. The filing fees must also include a date of service and a description of what the filing / server fee is for.
- Travel expenses are to be used on a limited basis and must be preapproved;

- Billing is to be submitted monthly for services rendered in the previous month;
- Invoices received for services more than 180 days after the date of service will not be paid;
- Billing statements must include a claim number, transaction code, participant's name and participant's social security number;
- Photocopies, toll calls, express delivery, messenger fees, fees for recording deeds, etc. are not covered under the plan and will not be reimbursed;
- Claim numbers cannot be issued to attorneys who do not have a current copy of the Declaration page of their insurance policy on file. If you have been notified that we are in need of an updated copy, please do so immediately.

If you have any questions, please call me or one of our Trust Specialists using the Fund's 800 number (In California (800) 222-3024 • Outside California (800) 222-3025). You can also reach us via Facsimile at (209) 940-5251 or email at LST@deltafund.com.

Sincerely,

Sarah Bagley
Account Manager
Delta Fund Administrators