

Osprey Approach: Creating a Fee Earner

This help guide was last updated on
Apr 15th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=22213>

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This guide will go through creating a fee earner

Osprey allows you to add as many fee earners as you need, regardless of your number of licenses. Licenses relate to *users* who can log in.

To add a new fee earner, follow the steps below.

Navigate to Supervisor > Code Setup > Fee Earners, and click the New button:

Supervisor

Code Setup

Fee Earners

New

Export

F/E

FEE EARNER DESCRIPTION

Supervisor

Code Setup

Fee Earner

Add

Save

Cancel

F/E:

Fee Earner Description:

Time Spent Target (Monthly):

Time Value Target (Monthly):

La Supplier No:

Fee Earner Status:

Supervisor

Phone No:

Mobile No:

Ensure you use your Exchange Credentials in order for Exchange Integration to function correctly.

Email Address:

Password:

Confirm Password

Advocate Reference:

Supervising Fee Earner:

Partner:

In Use

Advocate?

Grade:

(None)

Start Date:

End Date:

Enter the details as follows:

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Time Recording

To be able to time record with the new fee earner, the fee earner will need to be linked to a remuneration type. How to do so can be found in the below guide.

<https://support.ospreyapproach.com/guides/set-up-private-time-recording/>