Osprey Approach: Creating a Fee Earner (Browser)

This help guide was last updated on
Dec 22nd, 2022

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

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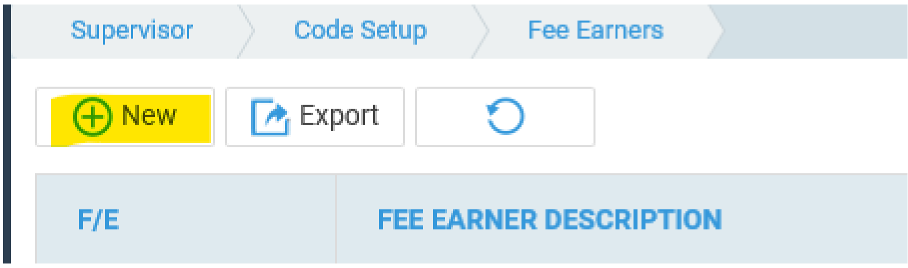
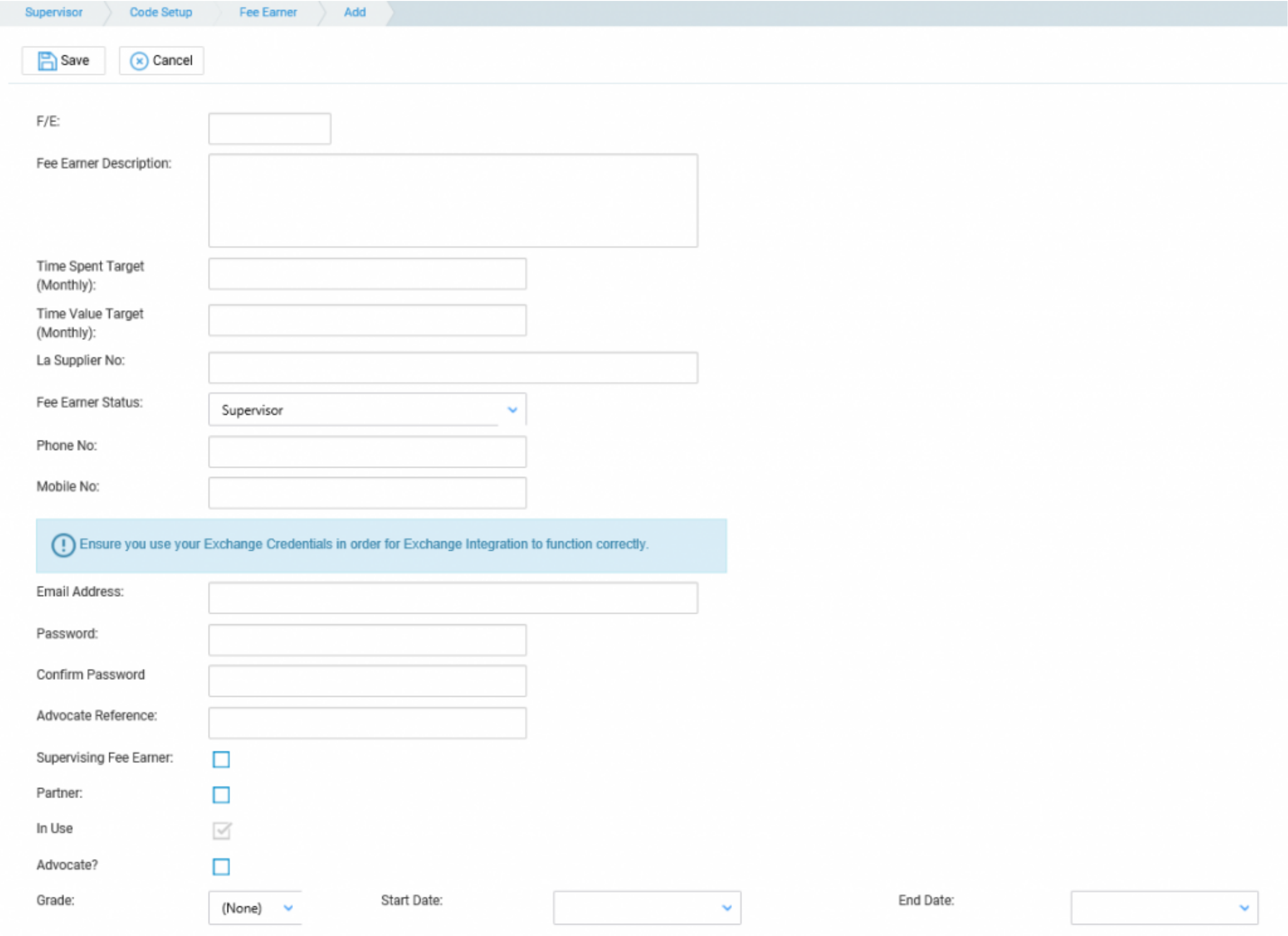
Osprey allows you to add as many fee earners as you need, regardless of your number of licenses. Licenses relate to *users* who can log in.

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

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





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:

This is the fee earner code, usually initials, though some firms

The [illegible]ner.

Fill this in if you have [illegible]n

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/