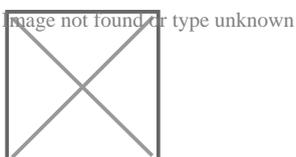


Osprey Approach: Add J Codes

This help guide was last updated on
Jul 28th, 2020

The latest version is always online at
<https://support.pracctice.com/?p=264>



Who is this guide for?

Case Workers, Case Management Supervisors and System Supervisors

We have also produced a short video if you prefer to watch these steps.

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Step 1

To add a J Code for use by civil litigators, first navigate to your Supervisor area and select Code Setup. Then click on Fee Earners.



Step 2

When you add a new fee earner or edit an existing one, you will have an option to assign a grade.

Please see the bottom of this page for a table listing the grade codes and description to assist you in selecting the relevant grade.

You will also have to enter the start and end dates.

Grade: Start Date: End Date:

Current grade: A

Step 3

Once you have amended or added the fee earner, they will be able to record time against the grade assigned to them.

Navigate to the Time Recording area to bring up the Time Ledger. You will notice there is a column headed Codes.

DATE	CREATED DA	CREATED BY	DESCRIPTION	F/E	ACTIVITY	UNITS	MINS	RATE	VALUE	GRADE	PHASE / TASK CODE	ACTIVITY CODE	CODES	ATT NOTE	UNDO
04/02/2019	04/02/2019	rob	ATC - Attending Client	RJ	ATC	12	72.00	100.00	120.00	A					
04/02/2019	04/02/2019	rob	EMO - Email Out	RJ	EMO	1	6.00	100.00	10.00	A					
04/02/2019	04/02/2019	rob	WAI - Waiting	RJ	WAI	4	24.00	100.00	40.00	A					
14/02/2019	14/02/2019	osprey	A Client Letter - Blank	RJ	STANLETT	1	6.00	25.00	25.00	A					
14/02/2019	14/02/2019	osprey	A Client Letter - Blank	RJ	STANLETT	1	6.00	25.00	25.00	A					
14/02/2019	14/02/2019	osprey	ATC - Attending Client	RJ	ATC	0	0.00	100.00	0.00	A					
27/03/2019	27/03/2019	tony	ATC - Attending Client	TH	ATC	4	24.00	110.00	44.00						

Step 4

Click the icon in this column to add a Phase/Task and Activity. Select them from the drop-down list and then click Save.

Phase / Task Code:

Activity Code:

Once saved, you will be returned to the Time Ledger and you will notice that the Phase/Task Code and the Activity Code columns now have the chosen information displayed.

PHASE / TASK CODE	ACTIVITY CODE	CODES	ATT NOTE	UNDO
JM10 	A102 			
				
				

Step 5

You can select the pencil icon in the Codes column to amend the information if required.

You can also add limits to show in Credit Limits and the reports. Under the Time Recording tab, you have the option to select Phase Limits.

Phase	<input type="text" value="Pre-action Costs"/>	Estimate (£)	<input type="text" value="1,200.00"/>	Warning (%)	<input type="text" value="75"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
Phase	<input type="text" value="ADR / Settlement discussions"/>	Estimate (£)	<input type="text" value="2,000.00"/>	Warning (%)	<input type="text" value="75"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
Phase	<input type="text" value="Disclosure"/>	Estimate (£)	<input type="text" value="850.00"/>	Warning (%)	<input type="text" value="75"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
Phase	<input type="text" value="Expert Reports"/>	Estimate (£)	<input type="text" value="4,000.00"/>	Warning (%)	<input type="text" value="75"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>

Step 6

Select the Add option to create a new limit.

Phase	<input type="text" value="Select"/>	Estimate (£)	<input type="text"/>	Warning (%)	<input type="text" value="75"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/>
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Select a phase and then add an estimate in pounds. You can then add a percentage value at which the limit warning will appear. Click Save to add the new limit.

Along with the time codes expense codes can also be added. Navigate to the Client Ledger tab to display the client ledger for your selected file.

There is a tick box for Show Ledger Expense Codes available above the ledger table.

| Currency: Show ledger expenses codes 

Tick this box and an additional two columns for Phase/Task and Exp (Expense) Code will be added to the ledger table on the far right.

DATE	DETAILS	REF	VAT	DISBS	OFFICE	CLIENT	PHASE / TASK	EXP CODE
23/08/2018	Fixed Price Bill	TR2109	139.00	0.00	695.00	0.00		
29/08/2018	Cheque from client	tr2908	0.00	0.00	0.00	250.00		
30/08/2018	Court Fees	TR3008	16.66	83.34	0.00	0.00		
30/08/2018	Payment of bill	Tr0509	0.00	0.00	364.00	0.00		

Step 7

Select the icon under the Exp Code column to open the Add panel and enter the relevant information here. Click Save when complete.

Phase / Task Code:

Expense Code:

The selected information will now be present in the client ledger table.

DATE	DETAILS	REF	VAT	DISBS	OFFICE	CLIENT	PHASE / TASK	EXP CODE
23/08/2018	Fixed Price Bill	TR2109	139.00	0.00	695.00	0.00	JM10	X102
29/08/2018	Cheque from client	tr2908	0.00	0.00	0.00	250.00		
30/08/2018	Court Fees	TR3008	16.66	83.34	0.00	0.00		
30/08/2018	Payment of bill	Tr0509	0.00	0.00	364.00	0.00		

Timekeeper Experience	Timekeeper Grade Code	Timekeeper Grade Description
PQE 8 years+	A	A: Solicitors with over eight years post qualification experience including at least eight years litigation experience.
PQE 7-8 years	B	B: Solicitors and legal executives with over four years post qualification experience including at least four years litigation experience.
PQE 5-6 years	B	
PQE 4-5 years	B	
PQE 3-4 years	C	C: Other solicitors and legal executives and fee earners of equivalent experience. "Legal Executive" means a Fellow of the Institute of Legal Executives.
PQE 2-3 years	C	
PQE 1-2 years	C	
PQE 0-1 years - newly qualified	C	
Trainee (year 2)	D	D: Trainee solicitors, paralegals and other fee earners.
Trainee (year 1)	D	
Paralegal	D	