

Osprey Approach: Setting up J Codes

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The latest version is always online at
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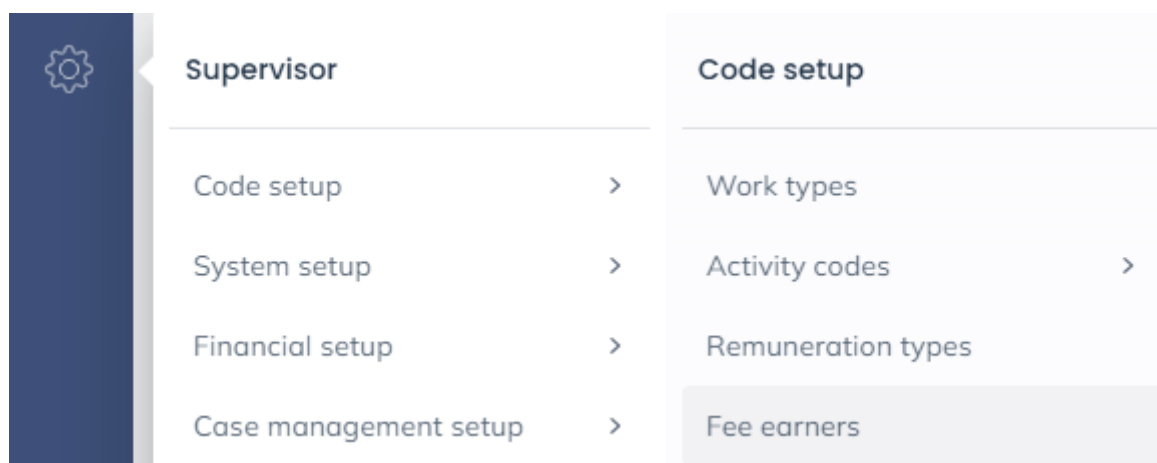
This guide will show you how to set up J Codes for use in Osprey

J Codes allow further categorisation of charges and expenses incurred during litigation, based on the experience of the litigator. This guide will demonstrate how to set up Fee Earners ready to use J Codes.

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

Setting up Fee Earners

To accurately record Tasks/Phase codes, you will need to assign the litigator a grading. Navigate to Supervisor > Code Setup > Fee Earners.



When you add a new fee earner or edit an existing one, you will have a choice to assign a grade at the bottom of the page.

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

Grade:	<input type="text" value="A"/>	Start Date:	<input type="text" value="01/01/2015"/>	End
Current grade:	A			


Once completed, the fee earner will be able to record time against the grade assigned to them. If several fee earners will be using the time recording,

Grading Table

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	

Configure Codes

Further Task Codes, Activity Codes and Expense Codes can be set up by a system supervisor, as well as amendments to existing Codes.



Supervisor	Code setup
Code setup >	Work types
System setup >	Activity codes >
Financial setup >	Remuneration types
Case management setup >	Fee earners
Compliance >	Groups
Integrations >	Franchise categories
CRM >	Standard text descriptions
Include documents	Attendance notes
Portal setup >	Fee earner status
Smart actions >	Phases/tasks
Report type	Activities
	Expenses
	Matters for review

Phase/Task Codes

Task codes define the task being performed, and can be mapped to one of ten phases. When adding or editing a task code, you can select which Phase is to be mapped to.

Add phase task code

 Save  Cancel

Code

Name

Description

All work relating to reviewing funding options

Mapping

Select ▾

- Pre-action Costs
- ADR / Settlement discussions
- Issue / Statement of costs
- Disclosure
- Witness Statement
- Expert Reports
- CMC

Activity Codes

Fee Earners can assign Activity codes to their time recording. Supervisors can also add new activity codes if required.

Add activity code

 Save

 Cancel

Code

A101

Name

Plan and prepare for

Description

Any planning or preparation associated with a matter. Includes budgeting and case assessment services if these are allowed by the client.

Expenses Codes

Much like Activity Codes, existing Expenses codes can be amended, or additional Expense Codes can be added.

Add expense

 Save

 Cancel

Code

X101

Name

Copies/Hard Copy Prints/Printing-BI

Description

Any black & white copies, Hard Copy Prints, digital prints from images, printing or reprinting costs billed on a per page basis when that printing is performed in-house and not by an external Supplier