

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>

[Click here for a printer-friendly version](#)

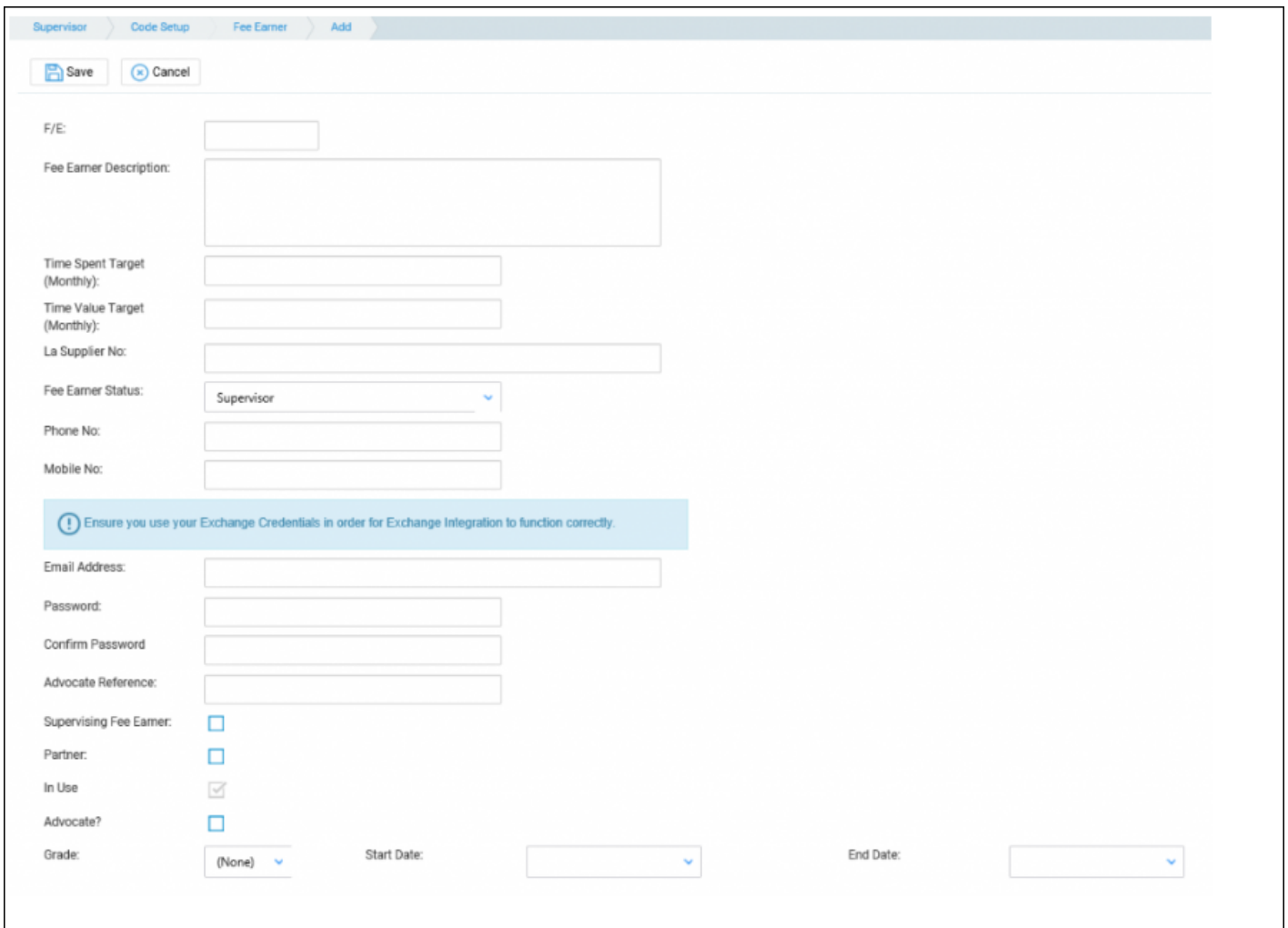
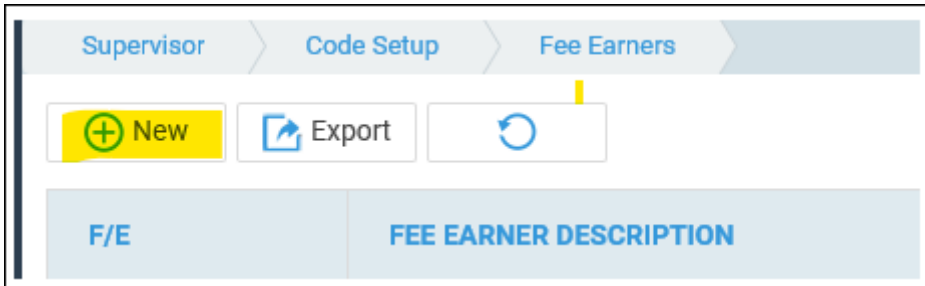


This guide will go through creating a fee earner

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:

A screenshot of the Osprey 'Add Fee Earner' form. The form is titled 'Add' and has a 'Save' button and a 'Cancel' button. The form contains the following fields:

- F/E: [Text input]
- Fee Earner Description: [Text area]
- Time Spent Target (Monthly): [Text input]
- Time Value Target (Monthly): [Text input]
- La Supplier No: [Text input]
- Fee Earner Status: [Dropdown menu, currently set to 'Supervisor']
- Phone No: [Text input]
- Mobile No: [Text input]
- ! Ensure you use your Exchange Credentials in order for Exchange Integration to function correctly.
- Email Address: [Text input]
- Password: [Text input]
- Confirm Password: [Text input]
- Advocate Reference: [Text input]
- Supervising Fee Earner:
- Partner:
- In Use:
- Advocate?:
- Grade: [Dropdown menu, currently set to '(None)']
- Start Date: [Text input]
- End Date: [Text input]

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/>