



Osprey Approach: Reports: Percentage Recovery

This help guide was last updated on
Jul 10th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=33155>



This guide will go through the Percentage Recovery report

This report shows the difference between billed costs and the amount of time ticked against the bill.

Percentage Recovery Report - Matter FE												
Practice Name:		Broom & Broom Ltd		Start:		End:		Date Report Run: 13/12/2023				
Client / Matter	Client Name	Matter Description	Bill No.	P/L	Remun	Matter F/E	W/T	Time Billed (Mins)	Time Billed (Value)	Fees	Under / Over	% Recovery
BR0001 / 20	O'Broom, Miss Lilian	Trailing Matter Proceedings	261	P	FIXEDFEE	MAB	FAMILY	0	0.00	100.00	0.00	100
JO00000001 / 2	Jones, Miss Johanna	Med. Education	222	P	FIXEDFEE	MAB	FAMILY	27	65.00	65.00	0.00	100
JOH00000001 /	Johnson, Mr Edward	Exceptional Investigations	270	L	CRIMAAP	MAB	CRIME	1080	749.82	178.40	-571.42	24
								139 :05	30,323.52	70,529.35	-519.70	

Filter options

The screenshot shows the filter options for the Percentage Recovery report. The interface includes a 'Run' button and several filter categories:

- Fee Earner:
- Work Type:
- Version: 30th September 20
- Remuneration:
- Private or LA: All
- Show Matter FE:
- Date Filters: From: [] To: []
- Grouping: No Grouping

The 'Grouping' dropdown menu is open, showing the following options:

- No Grouping
- Fee Earner
- Work Type
- Remuneration Type
- Private Or LA

- **Fee Earner** – Tick this box if you want to show only one or a selection of fee earners. Once the box is ticked all fee earners marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all fee earners, leave the box unticked.
- **Work Type** - Tick this box if you want to show only one or a selection of work types. Once the box is ticked all work types marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all work types, leave the box unticked.

- **Remuneration** - Tick this box if you want to show only one or a selection of remuneration types. Once the box is ticked, all remuneration types marked as In Use will appear. You can then tick each one that you want to report on. If you want to see all remuneration types, leave the box unticked.
- **Private or LA** – If left as All, this will show both Private and Legal Aid clients matters. You can choose to show only Private or Legal Aid clients by selecting the appropriate option.
- **Show Matter F/E** – tick this box if you want to see the Matter Fee Earner (the fee earner specified in the matter details) or clear it if you want to see the Time Ledger fee earner (the fee earner who posted the time). The Time fee earner option shows the bill broken down by the fee earners whose time was allocated to the bill.
- **Date Filters** – Enter the date range you want to report on here.

Grouping options

- **No Grouping** – This will produce the report in client number order.
- **Fee Earner** – This will produce the report in client number order, grouped and subtalled by Matter or Ledger fee earner, depending on whether you opted to Show Matter F/E or not.
- **Work Type** - This will produce the report in client number order, grouped and subtalled by work type.
- **Remuneration Type** - This will produce the report in client number order, grouped and subtalled by Remuneration type.
- **Private or LA** - This will produce the report in client number order, grouped and subtalled by whether the matter is private or legal aid.

List of columns produced

- Client No/Matter No
- Client Name
- Matter Description
- Bill Number
- Private or Legal Aid
- Matter Fee Earner/Time Ledger fee earner (depending on your filter choice)
- Work Type
- Time Billed Minutes
- Time Billed Value
- Fees (the costs amount entered in the bill posting)
- Under/Over figure (the difference between the total time ticked and the bill costs)
- Percentage Recovery (the percentage of costs billed versus time ticked against the bill)