

# Osprey Approach: Using J Codes

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Jul 30th, 2024

The latest version is always online at  
<https://support.ospreyapproach.com/?p=52571>

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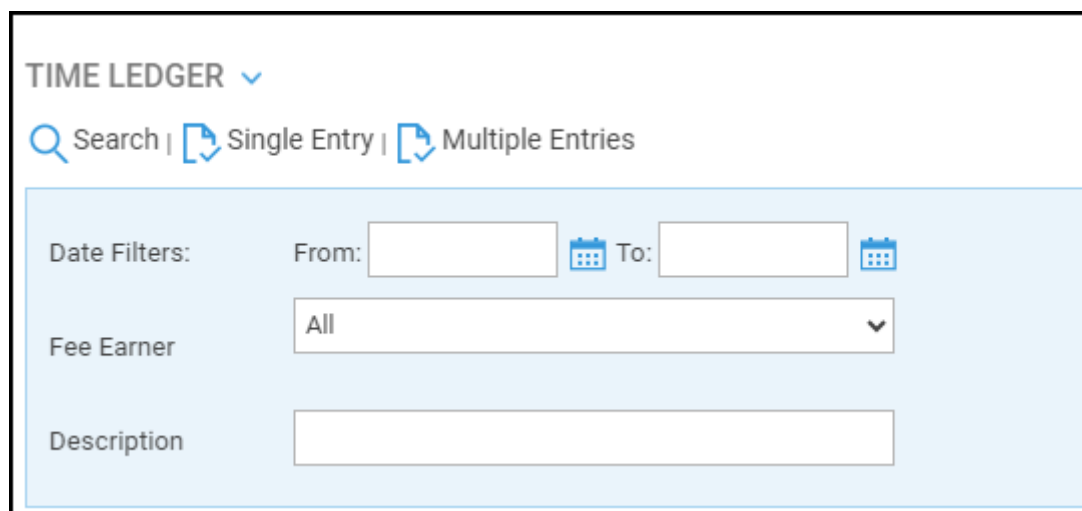


# J Codes allow further categorisation of charges and expenses incurred during litigation, based on the experience of the litigator. This guide will take you through how to use them in Osprey

To record time with J Codes, please ensure your grade codes have been set up to your fee earner by a relevant System Supervisor.

## Recording New Time

Open the Post Time Entry screen by going to Time Recording and selecting Single Entry or Multiple Entry.



The screenshot shows the 'TIME LEDGER' interface. At the top, there is a search bar with a magnifying glass icon and the text 'Search |'. To the right of the search bar are two buttons: 'Single Entry' and 'Multiple Entries', each with a document icon. Below the search bar, there are three filter sections: 'Date Filters' with 'From:' and 'To:' text boxes and calendar icons; 'Fee Earner' with a dropdown menu currently set to 'All'; and 'Description' with a text input field.

When using multiple Entries, the J Code selected will apply to all entries. These can be amended individually once posted.

Enter Details for your Time Entry. Use the Phase / Task Code and Activity Code dropdowns to select the relevant J Codes/

Time Recording > Multiple Timers > Post Time Entry

Post Time
  Create Timer

Fee Earner: DAN - Dan Hearne  
 Posting Date: 19/04/2024  
 Remun ID: STANDARD - Standard Remuneration  
 Activity: TELIN - Telephone Call In  
 Rate: 160.00 Hourly Rate  
 Units: 2 (12 mins)  
 Value: 32.00   
 Detail: TELIN - Telephone Call In  
 Attendance Note:  
 Include Global:

Time Keeper Grade Code: A  
 Phase / Task Code: JD10 - Mediation  
 Activity Code: A109 - Appear For/Attend

### Adding J Codes to existing Time Entries

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

	UNITS	MINS	RATE	VALUE	CODES	ATT NOTE	UNDO
	1	6.00	200.00	20.00			
	1	6.00	100.00	10.00		Add Phase/Task / Activity	
	1	6.00	200.00	200.00			










Click the icon in this column to add or amend a Phase/Task and Activity. Select the relevant code(s) from the drop-down list and then click Save.

Phase / Task Code: JM10 - Preparing Costs Claim ▾

Activity Code: A102 - Research ▾

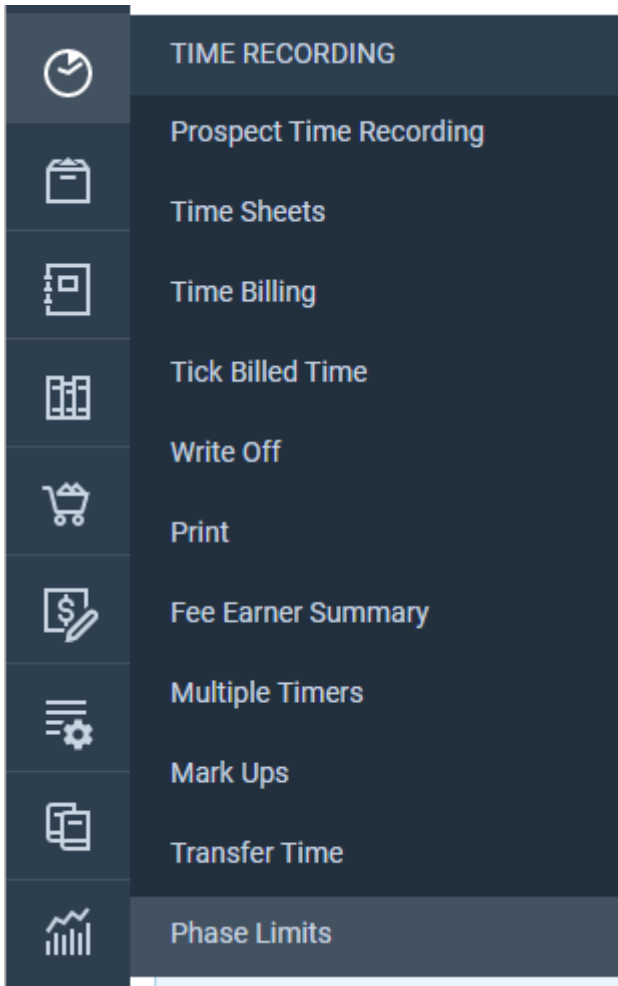
Cancel Save

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

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

## Credit Limits

You can also add limits to show in Credit Limits and the reports.  
Go to Time Record > Phase Limits



Time Recording > Phase Limits > 100003/1 (O'Wilson-Smith Steve) FE-DAN WT-FWRCP Purchase 6 Anfield Road

[+ Add](#)

Phase	Disclosure	Estimate (£)	100.00	Warning (%)	75	<a href="#">Save</a>   <a href="#">Delete</a>
Phase	ADR / Settlement discussions	Estimate (£)	2.00	Warning (%)	75	<a href="#">Save</a>   <a href="#">Delete</a>
Phase	CMC	Estimate (£)	111.00	Warning (%)	75	<a href="#">Save</a>   <a href="#">Delete</a>

Select the Add option to create a new limit.

Time Recording > Phase Limits

[+ Add](#)

Phase	Pre-action Costs	Estimate (£)		Warning (%)	75	<a href="#">Save</a>   <a href="#">Delete</a>
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- Select
- Pre-action Costs
- ADR / Settlement discussions
- Issue / Statement of costs
- Disclosure
- Witness Statement
- Expert Reports
- CMC
- PTR
- Trial Preparation
- Trial

Select a phase and then add an estimate. You can then add a percentage value at which the limit warning will appear.

Click Save to add the new limit.

# Linking Expense Codes to Disbursements on the Client Ledger

Navigate to Client Ledger for your selected file.

Ensure that Show Ledger Expense Codes is selected.



Columns displaying Phase / Task and Exp Code will now be shown, along with an option to Add.

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		

Select Add. A pop-up window will appear, allowing you to select the Phase / Task and Expense Code(s). Click Save.

Phase / Task Code:

Expense Code:

The selected information will now be present on the Client Ledger.

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		