

Osprey Approach: Using J Codes (Browser)

This help guide was last updated on
Dec 22nd, 2022

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



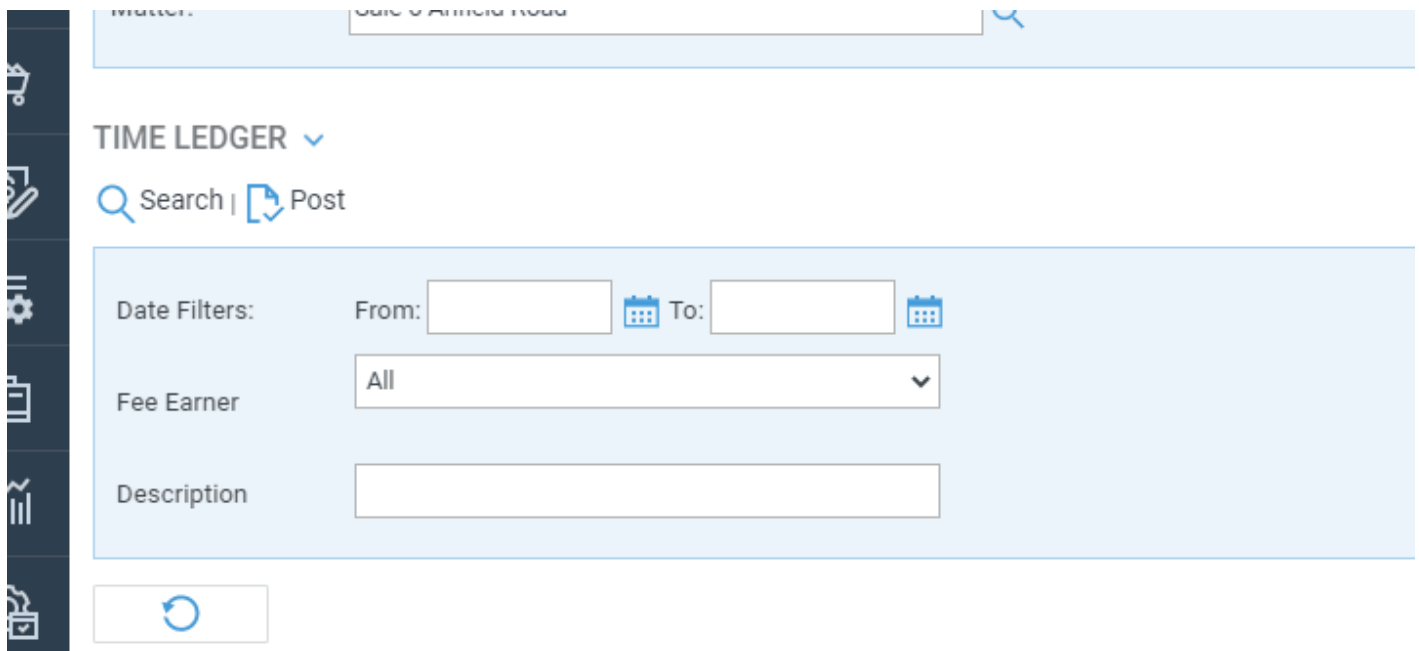
J Codes allow further categorisation of charges and expenses incurred during litigation, based on the experience of the litigator.

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

<https://support.ospreyapproach.com/guides/add-j-codes/>

Recording New Time

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



The screenshot displays the 'TIME LEDGER' interface. On the left is a dark sidebar with icons for various functions. The main area has a header with 'TIME LEDGER' and a dropdown arrow. Below this is a search bar with a magnifying glass icon and a 'Post' button with a document icon. The filter section includes 'Date Filters' with 'From' and 'To' date pickers, 'Fee Earner' with a dropdown menu currently set to 'All', and 'Description' with a text input field. A circular refresh icon is located at the bottom left of the filter section.

Enter Details for your Time Entry. To the right-hand side you will have the Phase/Task Code and Activity Code dropdowns.

Time Recording
Multiple Timers
Post Time Entry

Save and Print
Post
Cancel

☒ Post Time
☐ Create Timer

Fee Earning:
DAN - Dan Hearne

Posting Date:
19/12/2022

Remun ID:
STANDARD - Standard Remuneration

Activity:
TRV - Travel

Rate:
100.00
Hourly Rate

Units:
0
(mins)

Value:
0.00
Recalculate

Detail:
TRV - Travel

Attendance Note:

Include Global:
☐

Time Keeper Grade:
A






















Code:

Phase / Task Code:
Select

Activity Code:
Select

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.

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						

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:
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 now have the chosen information displayed.

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

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

Credit Limits

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.

TIME RECORDING

Prospect Time Recording

Time Sheets

Time Billing

Tick Billed Time

Write Off

Print

Fee Earner Summary

Multiple Timers

Mark Ups

Transfer Time

Phase Limits

+

Add

Phase	Pre-action Costs	Estimate (£)	1,200.00	Warning (%)	75	Save Delete
Phase	ADR / Settlement discussions	Estimate (£)	2,000.00	Warning (%)	75	Save Delete
Phase	Disclosure	Estimate (£)	850.00	Warning (%)	75	Save Delete
Phase	Expert Reports	Estimate (£)	4,000.00	Warning (%)	75	Save Delete

Select the Add option to create a new limit.

Phase

Select

 Estimate (£) Warning (%)

75

Save

Delete

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.

Linking Expense Codes to Disbursements on the Client Ledger

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.

Refresh

o Office Bank Receipt

Post

 | Currency:

GBP

☒ 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		<div></div>
29/08/2018	Cheque from client	tr2908	0.00	0.00	0.00	250.00		<div></div>
30/08/2018	Court Fees	TR3008	16.66	83.34	0.00	0.00		<div></div>
30/08/2018	Payment of bill	Tr0509	0.00	0.00	364.00	0.00		<div></div>

Select the Add icon under the far right column to open the Add window.
Enter the relevant information here and click Save when complete.

Phase / Task Code:

JM10 - Preparing Costs Claim

Expense Code:

X102 - Copies/Hard Copy Prin

Cancel

Save

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		