



Osprey Approach: Using J Codes

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

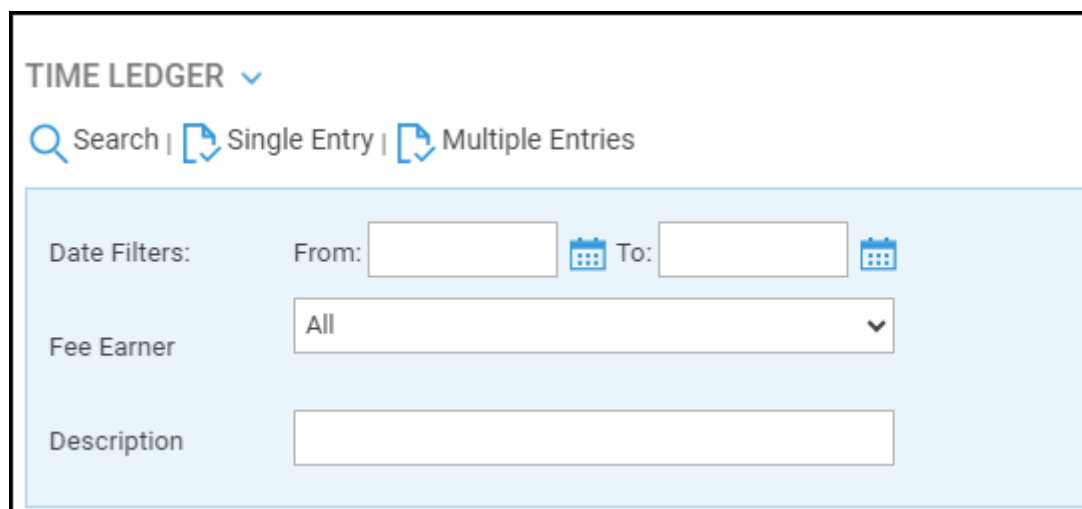


J Codes allow further categorisation of charges and expenses incurred during litigation, based on the experience of the litigator. This guide will take you through how to use them in Osprey

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 icon and the text 'Search | Single Entry | Multiple Entries'. Below this, there are three filter sections: 'Date Filters' with 'From:' and 'To:' date pickers, 'Fee Earner' with a dropdown menu 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 | | | |
| | 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 ▾

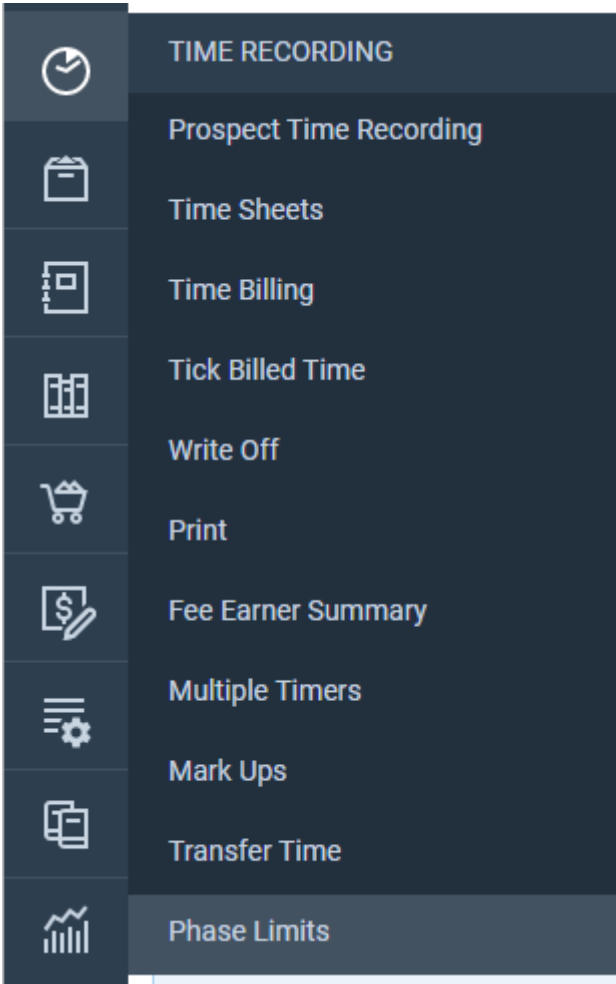
Cancel Save

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 | Save Delete |
| Phase | ADR / Settlement discussions | Estimate (£) | 2.00 | Warning (%) | 75 | Save Delete |
| Phase | CMC | Estimate (£) | 111.00 | Warning (%) | 75 | Save Delete |

Select the Add option to create a new limit.

Time Recording > Phase Limits

[+ Add](#)

| | | | | | | |
|-------|------------------|--------------|--|-------------|----|---|
| Phase | Pre-action Costs | Estimate (£) | | Warning (%) | 75 | Save Delete |
|-------|------------------|--------------|--|-------------|----|---|

- 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.

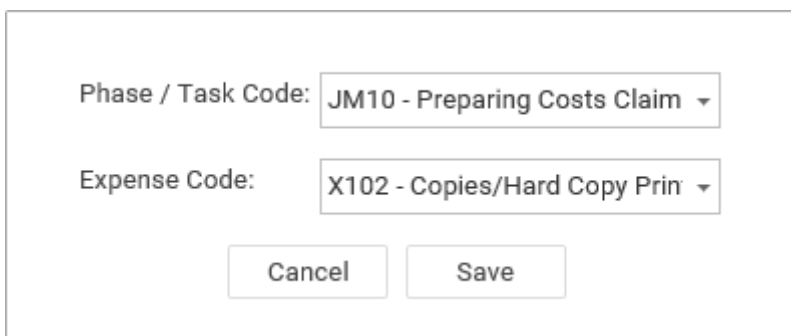


Refresh Office Bank Receipt Post | Currency: GBP Show ledger expenses codes

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: JM10 - Preparing Costs Claim

Expense Code: X102 - Copies/Hard Copy Print

Cancel Save

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 | | |