Osprey Approach: Using J Codes

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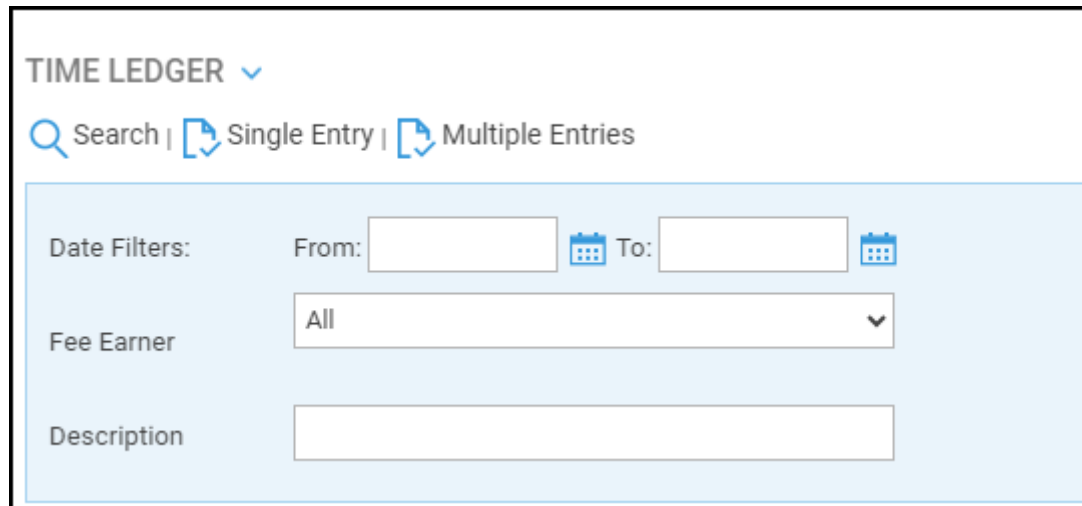
Osprey
Approach

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.

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/

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.
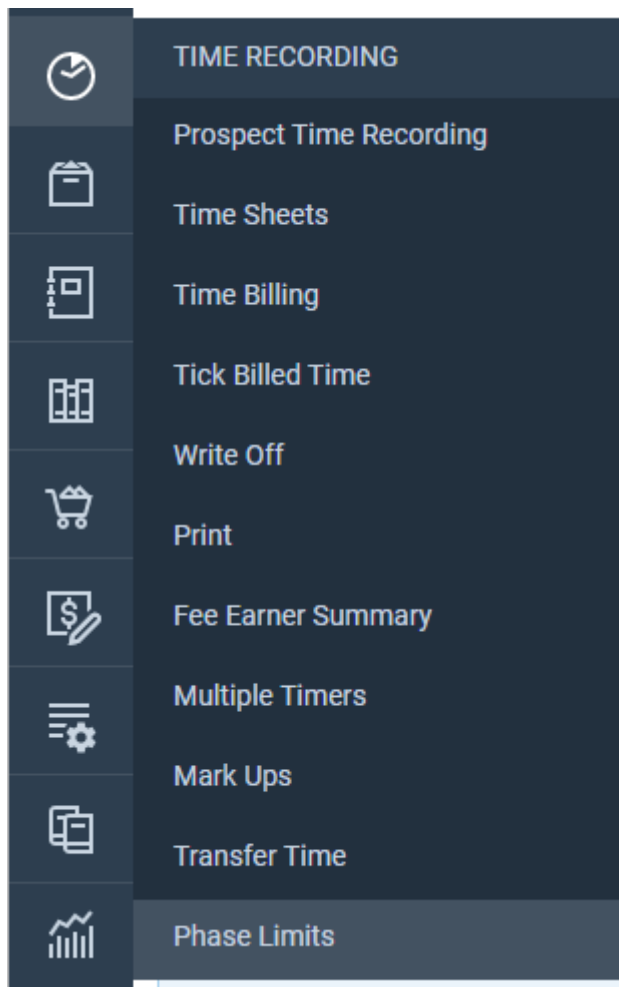Select the relevant code(s) from the drop-down list and then click Save.

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.

Credit Limits

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

Select the Add option to create a new limit.

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.

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			