

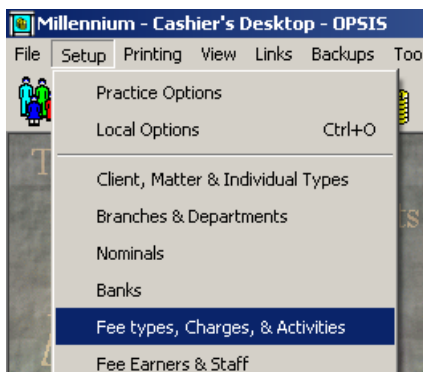
Miscellaneous Charges

Miscellaneous charges are internal practice charges that are made to the client but not paid to an external supplier, for example, faxes, fee earner's mileage, etc.

Setting up a new miscellaneous charge

To create a new miscellaneous charge:

1. Go to the Setup menu and select Fee types, Charges, and Activities:



2. Select the Miscellaneous charges tab page:

 A screenshot of the 'Fee types, Charges, & Activities Maintenance' window. The 'Miscellaneous charges' tab is selected. Below the tabs is a table with the following data:

Code	Description	Nominal code	Price
FAx	Faxes	00042000	0.50
M1	Miscellaneous Charges	00042000	0.00
MIL	Mileage	00042000	0.45
PHD	Photocopies	00042000	1.00

3. Click on the Add button to create a new charge.

Code is the unique 3 character code that identifies this miscellaneous charge.

Status is the record's status. This is normally live, but it will become archived if you try to delete a record that still has work in progress.

Description is the description of this miscellaneous charge.

Nominal code is the nominal account that will be associated with this miscellaneous charge.

The **Cost** to practice is currently information only, and although intended for future analysis use, it is currently unused.

The **Price** is used in conjunction with the Quantity entry field when posting Misc. Charge.

The **Default Fee Charge** is used when posting a bill which Misc. Fees can be added to.

The **Mileage** and **Travel** tick boxes are for Legal Aid forms, e.g. CDS7 and CDS11 where mileage and travel must be accounted for separately. For example, if the miscellaneous charge is "mileage", then both the **Mileage** AND **Travel** boxes are ticked, whilst if it is "parking" or "train fares" tick only the **Travel** box.

4. Click on the **OK** button to add the new miscellaneous charge.

Posting miscellaneous charges

There are two methods for entering miscellaneous charges:

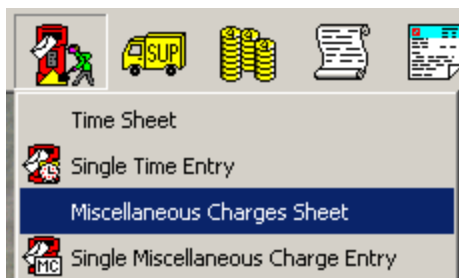
1. Miscellaneous charges sheet – allows you to enter a list of entries.

2. Single miscellaneous charge entry – allows you enter a single time entry for a matter.

Miscellaneous charges sheet entry

To use the miscellaneous charges sheet to enter a list of entries:


1. Go to the **WIP Posting** icon and select **Miscellaneous Charges Sheet**:

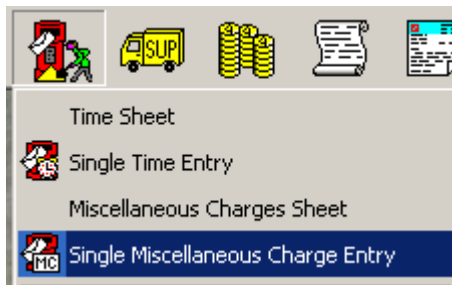


2. Select Miscellaneous charges input and click on the **Next** button.
3. Check that the period is correct and click on the **Next** button
4. Enter the date for the charges entry, and any reference you may use. Click on the **Next** button.
5. To add a miscellaneous charge, click on the Torch next to the **Matter** field and locate the matter.
6. Click on the Torch next to the **Misc charge** field and select an appropriate charge. Enter the Quantity and the charge value.
7. You can enter detail in the two **Detail** fields, for example, you may wish to change the Mileage description to '*Mileage from Kilburn to Holborn Police Station*'.
8. Click on the **Add** button to add the next miscellaneous charge and complete it as above.
9. Once you have entered all of your miscellaneous charges, click on the **Post** button to post them all to the relevant ledger cards.

Single miscellaneous charge entry

To use the single miscellaneous charges entry:

1. Select the **Single Miscellaneous Charges** icon  from the ledger card, or from the **Client, Matters and Individuals** screen or go to the **WIP Posting** icon and select **Single Miscellaneous Charges Entry**:



2. Check that the period and date is correct. Enter the Fee earner code (click on the Torch and select the fee earner from the list), the Matter number (click on the Torch next to the **Matter** field and locate the matter) and any time sheet reference you may use. Click on the **Next** button.
3. Click on the Torch next to the Miscellaneous charge field and select an appropriate charge.


Use the Tab key to enter a figure in the **Quantity** field.

If the field is not already populated, use the Tab key to enter a figure in the **Price** field.


Enter detail in the **Detail** field about what the charge is for:

Single Misc Charge Entry - Post entry on 000003/0001

Charge details

Miscellaneous charge:  Fares

Quantity:

Price: 

Value:

Detail:

Post fee earner's expense

Matter balances	
Worked value	210.75
Billed value	0.00
Unbilled value	210.75

Help < Back Next > Close

- If Fee earner's expense posting is set up, you can tick the **Post fee earner's expense** box and click on the **Next** button. This will open the **Expense Details** screen:

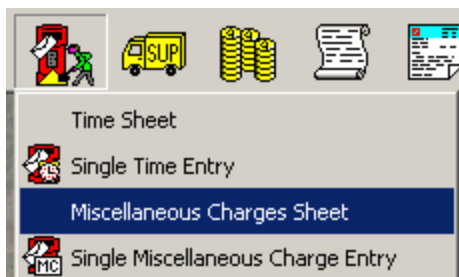
Enter the appropriate nominal account for the expense, enter the amount you will be paying the fee earner in the **Amount** field and make the posting VAT able as appropriate. Then click on the **Next** button.

- Enter any notes as required and then click on the **Post** button to post the time entry to the relevant ledger card.

Deleting miscellaneous charges entries

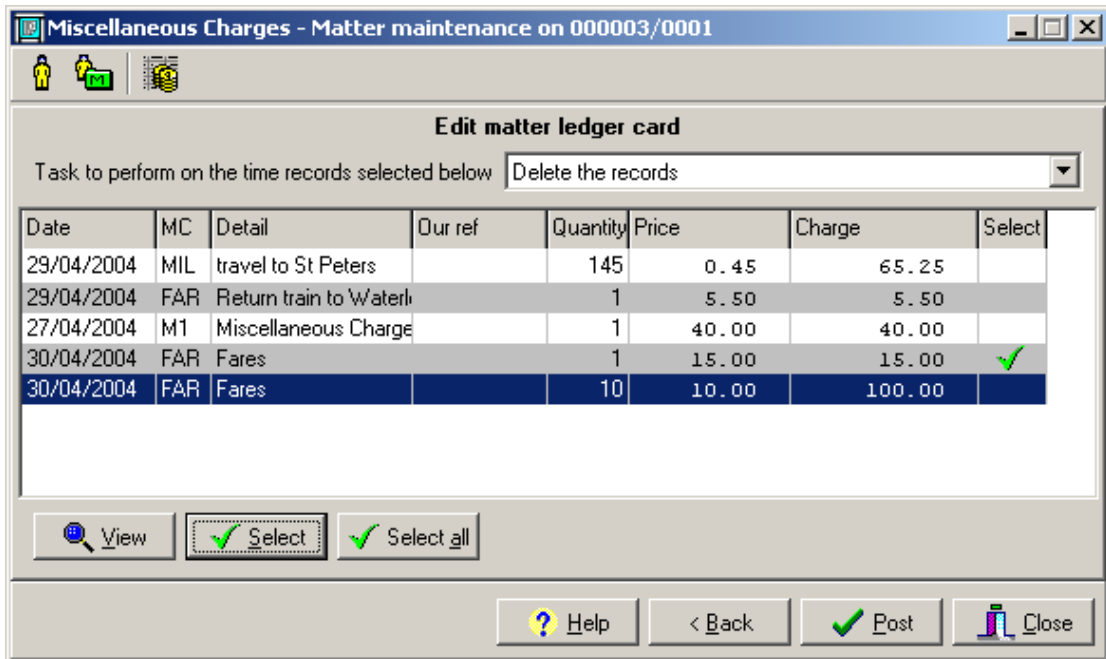
To delete unbilled miscellaneous charges posted to a ledger card:

- Go to the **WIP Posting** icon and select **Miscellaneous Charges Sheet**:



- Select **Miscellaneous charges input** and click on the **Next** button.
- Select **Edit existing miscellaneous charge entries for a matter** and click on the **Next** button.
- Click on the Torch and locate the matter. You can also restrict the unbilled miscellaneous records by Date. Click on the **Next** button.

- Highlight the time entries you would like to delete and click on the **Select** button or the **Select All** button if appropriate. This will put a green tick in the Select column:

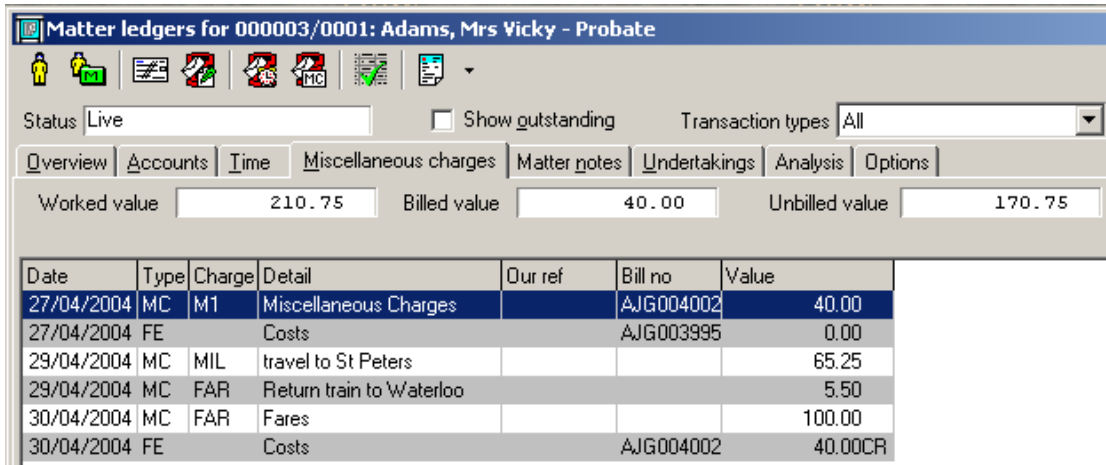


In the **Task to perform on the time records selected below** list, select 'Delete the records' and click on the **Post** button. You will be asked if you want to delete these records, click on the **Yes** button.

Viewing posted miscellaneous charges records

To view a miscellaneous charge record:

- Press the F8 key to open the matter ledgers.
- Use the Search facility to locate the ledger card for the client you are interested in.
- Click on the **Miscellaneous charges** tab page to view all the time entries for that matter:



Billed miscellaneous charges will have a bill number displayed in the Bill number column.

