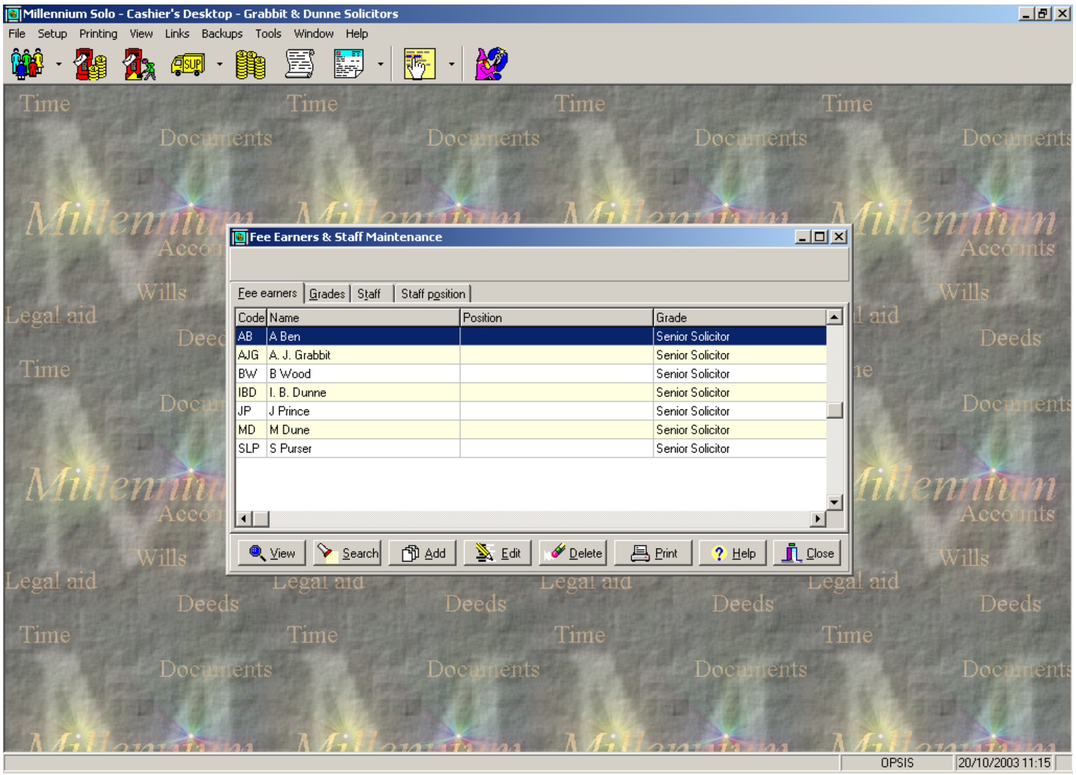
How to set up Fee Earners

Click on the **Setup** menu and select **Fee Earners & Staff** to display the **Fee Earners & Staff Maintenance** screen:



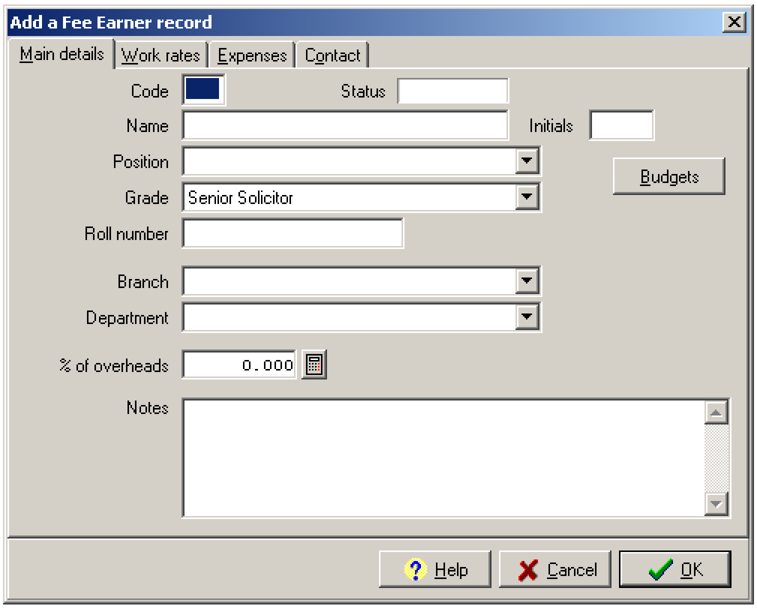
Click on the **Add** button to add a new fee earner.

Click on the **Edit** button to change details of an existing fee earner.

Click on the **Delete** button to remove a fee earner record.

To add a fee earner record

To add a fee earner record, click on the **Add** button:



Code is the unique 3 character code that identifies this fee earner.

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

Name is the fee earner's name.

Initials are the fee earner's initials.

Position is the staff position. This can be configured by clicking on the **Setup** menu and selecting **Fee Earners & Staff** and **Staff Position**.

Grade is the grade. This can be configured by clicking on the **Setup** menu and selecting **Fee Earners & Staff** and **Grades**.

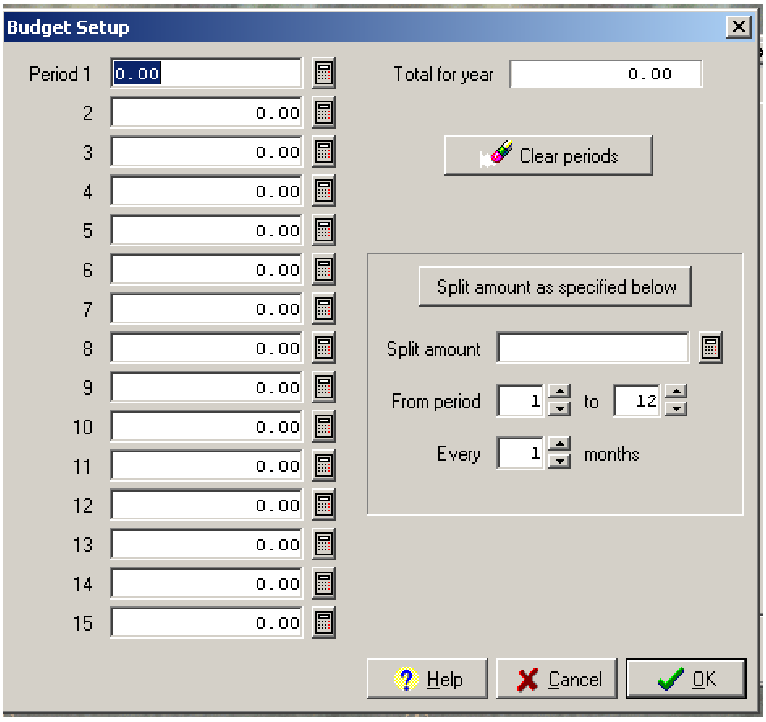
Roll number is the law society roll number for this fee earner.

Branch is filled in if this fee earner belongs to a particular branch.

Department is filled in if this fee earner belongs to a particular department.

% of overheads may be used for the fee earner split when analysing overheads data by fee earner.

To set the budget figures for the fee earner click on the **Budget** button to open the **Budget Setup** screen:



The budget amount for each of the 15 periods is shown together with a total for the year.

When editing the record you can set the budgets in each period by one of two ways:

1. Manually enter a budget amount in the box for each period.

2. Enter one amount and have it split automatically between the periods:

    a. Enter a total in the **Split amount** as specified below box.

    b. Set the **From period** and **to** period.

    c. Set the frequency in the **every** x **months** box.

    Use the **Split amount** as specified below button to split the total and fill in the period amounts.

For example; To split an amount over 12 months use **From period** *1* **to** *12* **Every** 1 **months** To split and amount quarterly use **From period** *1* **to** *12* **Every** *3* **months**

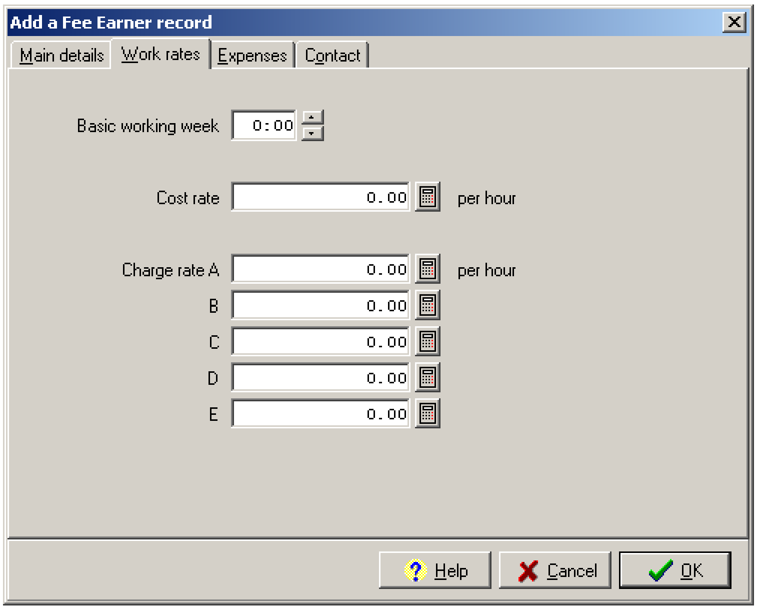
e. You can repeat this procedure again if you need to. You might want to split an amount over the first six months and then a different amount over the last six months for example.

To clear all of the period amounts use the **Clear periods** button.

Click on the **OK** button.

To set fee earner rates

To set fee earner private rates, go to the **Work rates** tab and enter the required figures for **Charge rate A, B, C, D** and **E**:



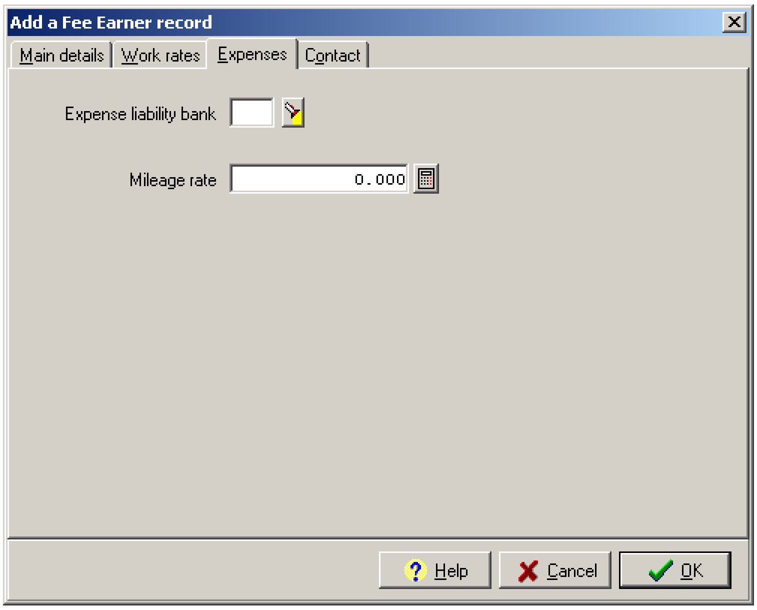
The **Basic working week** is how many hours the fee earner works in a week and will be used in the time reports.

The **Cost rate** is the cost per hour of the fee earner to the practice.

Enter up to five **Charge rates** for the fee earner in boxes **A** to **E**. These will be used when calculating the charge value of time worked. (The default is **Charge rate A**). The Activities category on the matter decides which of the fee earner charge rates will be used.

To set fee earner expenses

To record fee earner expenses to a fee earners expense bank account, go to the **Expenses** tab page:

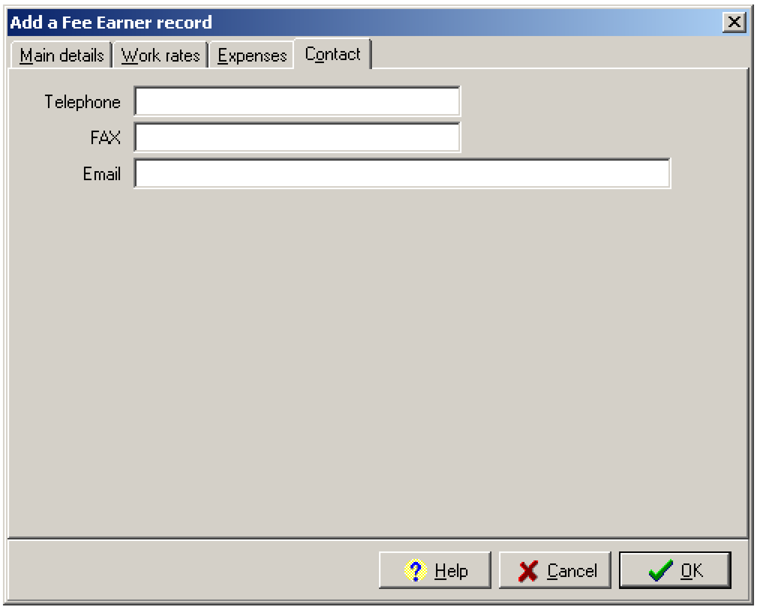


The **Expense liability bank** specifies which bank account will be used as the expense liability bank for the fee earner. An expense liability bank is a bank balance sheet account to pay expenses when posting miscellaneous charges.

The **Mileage rate** is the cost per mile to use as a default rate when doing expenses with a miscellaneous charge that is a mileage type.

To set fee earner contact details

To record contact details against a fee earner, go to the **Contacts** tab page:



Telephone is a telephone number.

FAX is a FAX telephone number.

Email is an email address. This is the email address that will be used if the **Email fee earner when a batch transaction is posted/deleted** option is enabled in **Practice Options**.

To save the fee earner record, click on the **OK** button.

