

- Fee Earner Changes The 'Fee-Earner Changes' menu contains options that allow the user to carry out global changes to the fee-earners that have been set up in Client and File Records in the database. It is advisable to consult Curat Lex Help Desk prior to running these programs to ensure that they will achieve the desired result.
- Change Fee-Earner This option should be used to change all occurrences of one fee-earner and insert a new fee-earner (ie global change) on all file records in the database. **This option is useful, for example, if a fee-earner leaves the firm and all of his/her files are to be transferred to another fee-earner.**
- When using the 'All Details' option, it is necessary to enter the initials of the original F/E and then the initials of the new F/E (together with new cost centre and new department codes if required). Both the original fee-earner initials and new fee-earner initials should exist on the system (ie in Utilities –Module Parameters –F/E's & Charge Rates) before running the program. The 'Print TOB Info' option is not operational.
- The 'Cost Centre/Dept Only' option allows global change of cost centre and departments on all File Records that belong to a specified F/E. This option does not change the F/E initials.
- After the program has completed, a report is produced which lists all of the file changes (ie. F/E 1, F/E2 and Carer). Note that management information for both fee-earners will remain on the system.
- Important**
- If the original fee-earner has left the firm, then his/her F/E details should be amended (ie. set Leaver flag to 'Yes' and set charge rates to zero) using the 'Module Parameters –F/E's & Charge Rates –Amend' option. The original fee-earner should **NOT** be deleted from the system because management information and unbilled time records may still exist in the database.
- For more information about removing F/E's from the system, refer to separate document "Removing F/E's from the system".
- Amend Initials This option should be used when a specific fee-earner changes their initials only. **This option is useful, for example, if a F/E gets married and her surname changes.** The actual fee-earner remains on the system but with new initials together with their original management information.
- Firstly, change the fee-earner initials using 'Module Parameters –F/E's & Charge Rates –Amend' option. This updates the fee-earner list and Man Info screens.
- Then use this 'Utility Programs –Fee-Earner Changes –Amend Initials' option to update all currently OPEN file records (ie F/E1, F/E2 and Carer). Time records are also updated.
- NB. Be aware that if any closed files are subsequently re-opened, then the user must check the F/E initials and update if necessary.