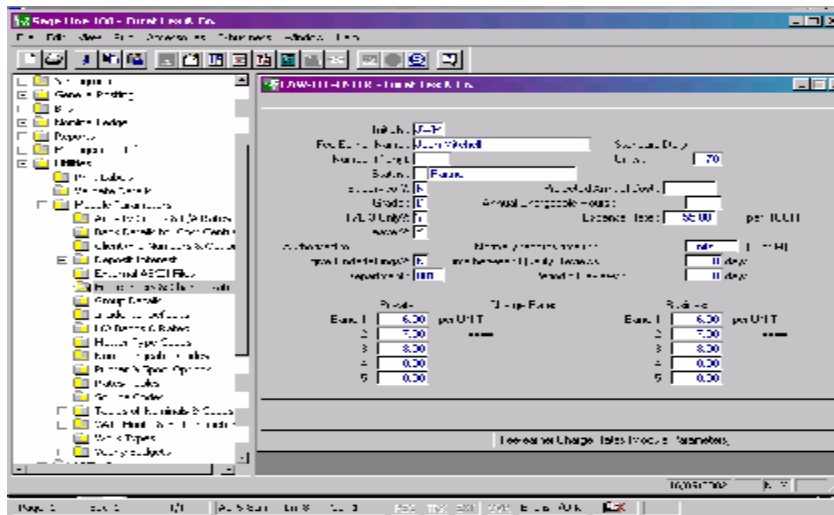


Removing F/E's from Sovereign LAW

When a F/E leaves your firm, you should initially set them as 'Leaver' using the 'Utilities -Module Parameters-F/E's & Charge Rates -Amend' option. This means that a warning will be displayed if an attempt is made to set them up as F/E1 or 2 on new file records etc. Also, they are moved to bottom of Management Info MTD & YTD list. You should also set their Private/Business charge rates to zero to prevent any further time recording.



The F/E should NOT be removed from the system immediately.

You should NOT delete a F/E from the system if:

- (i) -they are still either the F/E 1 or 2 on current File Records

Check list of open files for the F/E:

(Reports -File Based -F/E 2 Order or Supervisor Order -List Open Files)

If necessary, use Amend Details option to reset the F/E on specific files to a current F/E.

Alternatively, use the global F/E change option (Utilities -Utility Programs -F/E Changes -Change F/E -All Details -Noprint TOB). Enter initials of F/E who has left and then enter initials of current F/E who is to take over the files. Leave CC and Dept blank. The program will send report to spooler listing all changes

- (ii) -they still have Apportioned Fees in the current Management Info YTD

Check Apportioned Fees YTD for the F/E (Management Info -Fee-earners)

Note that the YTD fees will be cleared down to zero after the next Year End.

- (iii) -they still have unbilled time (WIP) in the system

Check unbilled WIP for F/E:

(Man Info -Reports -Aged WIP -New List -Report)

Use the Re-enter Mask option and specify initials of F/E. Leave all other boxes as ???.

Select the Initials option to run the report.

When posting bills, fees will continue to be automatically apportioned to this F/E until all of their WIP is cleared from the system. This is the correct procedure.

Deleting F/E's from the system:

If the F/E has none of the above, then the F/E can safely be removed from the system using the option 'Utilities -Module Parameters -F/E's & Charge Rates -Remove'.