

Precedent H Completion

How to complete Precedent H using iDraft Pro

Court/Parties/Claim Number

The Court/Parties/Claim Number information is inputted using the Front/Back Sheets Section of iDraft Pro (please refer to iDraft Pro User Guide for more information).

Costs budget of/dated - Party filing cost estimate/estimate of costs dated

In the Bill Setup section of iDraft Pro, click on the Precedent H Setup slider tab. Fill in the text box to complete details of the Party filing the costs estimate together with the date of the costs estimate.

This estimate excludes...

In the Precedent H Setup section of Bill Setup, tick the relevant boxes to indicate that the Precedent H excludes those selected items. NB ticking the VAT and Success fees and ATE insurance premium, will remove these items from the exported Precedent H, even if VAT, success fees and ATE have been included during drafting.

Work done / to be done Headers

The Work done / to be done (Section) Headers can be selected and defined from the Precedent H Section slider tab in Bill Setup. The Precedent H Headers (Pre-action costs, Issue / statements of case, CMC, Disclosure, Witness statements, Expert Reports, PTR, Trial Preparation, Trial, ADR / Settlement discussions, Contingent Cost A, Contingent Cost B) are pre-defined when a new iDraft Pro PR1 file is started.

To redefine the Section Headers, simply double click on the relevant Section in the list presented. This will be necessary to define the details of the Contingent Costs. To add additional Section Headers (a further 1 can be added to Precedent H), click on the Add button and type in the name as required and click on the Save button. Any additional Section Headers in excess of Contingent Cost C will not be included on the exported Precedent H.

Assumptions

To add information regarding any relevant assumptions per section, double-clicking the relevant Section Header in the Precedent H Section slider tab in Bill Setup, will allow text to be inputted. The space available amounts to approximately 1,000 characters, allowing between 150-200 words. A character counter will advise you when you are nearing the suggested maximum number of letters.

Fee earners' time costs

You set up details of your fee earners and their rates, as you would when drafting a bill, through the Fee Earners & Rates section of iDraft Pro. Precedent H only allows 4 rates to be shown. We would suggest using Band A to D for the first four Fee Earner Groups, though this would be at your discretion and is not mandated by iDraft Pro. Any Fee Earner Groups in excess of the first 4 will not be included in the exported Precedent H.

iDraft Pro will allow you to create multiple Parts based on the same Section Header (e.g. 3 Parts under Section Header Pre-action costs) and for each Part a different VAT rate, Success Fee or Hourly Rate may be applied. In such circumstances, iDraft Pro will combine the totals from the 3 parts into a single Section Header when the Precedent H is exported. iDraft Pro will then calculate an average Hourly Rate, which will show under the RATE (per hour) column in the exported Precedent H. This will be based on the Total for that section divided by the number of hours and may not reflect the inputted rates in the Fee Earner & Rates section of iDraft Pro.

Inputting information for the Work done / to be done (Section)

In Part Setup, select or add a Part and click on the Precedent H Options slider tab. This will give you the ability to set the Part to the relevant Section, so that information can be added. In this window you can also set whether the work done in the Part is estimated or incurred. This will then show in the exported Precedent H. It is possible to create multiple parts for the same Section (as above) for which one Part could be estimated time and the other part reflect incurred time.

Proceed to add information to the parts as if you were drafting a normal bill (see iDraft Pro User Guide for more information).

Disbursements/Counsels' Fees

Disbursements

Disbursements are added in the same way as when drafting a bill (again see iDraft Pro User Guide for more information), but to reflect Precedent H, it will be necessary to select the type of disbursements being claimed, i.e. Fees/Disbursements (Expert's costs (1)), Court Fees (3), Other Disbursements (4).

In the Disbursement window, click the drop down box in the Precedent H Options section and select the requisite type of disbursement (Fees/Disbursements/Court/Other).

Expert Fee Summary

Any fees added in the Expert Reports Section will populate the Expert Fee Summary. Any disbursements which share the same description when entered in the Disbursement window in iDraft will appear under the same Type in the Precedent H. Thereafter, fees entered under an incurred part will appear under the past incurred column in the Precedent H. Fees entered under an estimated part will appear under the future columns. For estimated (future) fees it will be necessary to check either of the Future report, Future conference or Future joint stms checkboxes. On export the fees will appear under the relevant columns.

Counselors' Fees

To add Counselors' Fees, first click on the Counsel button in the Bill Options and complete Name, VAT and Success Fee details as normal. Then in the Precedent H Options, choose the Type of Counsel (Leading/Junior), Years Since Call (1-11+ and QC) and Counsel's Hourly Rate.

Only one type of Counsel (i.e. Leading/Junior) can be selected and only 2 Counsel can be used in the Precedent H. Any information inputted for the third or subsequent Counsel will be disregarded when the Precedent H is exported to Word.

If no Hourly Rate is inserted in the Counsel setup window, then iDraft Pro will detail Counselors' Fees as a fixed disbursement when exporting Precedent H. If an Hourly Rate is set then iDraft Pro will divide the fee inserted into the Disbursement Window under Counsel by the Hourly Rate set in the Counsel Setup Window to give the number of hours in the exported Precedent H.

Explanation of disbursements

This information is inserted by double-clicking the relevant Section Header in the Precedent H Section slider tab in Bill Setup. Only about 20 words can be inserted in this box, so you may wish to complete this information on a rider sheet. Again a character counter will advise you when you are nearing the suggested maximum number of letters.

Export to Word

Exporting to Word takes place as normal. Click on File > Export to Word... and check on the Precedent H checkbox to export the relevant document and click on Export.