

Jackson Steering Committee – Publication of the Jackson EW-UTBMS Litigation 'J-Code-set' for use in England and Wales

1. **London (September 23, 2014)** — The Jackson Steering Committee is pleased to announce that it has recently published the new UTBMS Litigation Code-set for use in England and Wales (the EW-UTBMS J-Code-set) - on UTBMS.COM (www.utbms.com).
2. UTBMS stands for the Uniform Task Based Management System, a series of codes used in legal ebilling to classify services performed and expenses incurred. The J-Codes comprise a set of UTBMS codes specifically for use in England and Wales in cases for which Precedent H (the standard costs budget) is suitable. They have been developed by the Jackson Steering Committee, a group of industry representatives authorised by the Judiciary and working on a voluntary basis.
3. The committee's task is to help implement this recommendation from the Jackson Final Report: "A new format of bills of costs should be devised, which will be more informative and capable of yielding information at different levels of generality... Software should be developed which will (a) be used for time recording and capturing relevant information and (b) automatically generate schedules for summary assessment or bills for detailed assessment as and when required. The long term aim must be to harmonise the procedures and systems which will be used for costs budgeting, costs management, summary assessment and detailed assessment."
4. The publication of the J-Codes is the first step towards that long term aim. The J-Codes are based on the Phase/Task/Activity structure. They are the foundations of a system under which contentious work may be recorded electronically and "reports" produced, automatically and at minimal cost, in whatever form may be required for budgeting, summary assessment, detailed assessment, solicitor/client billing or other purposes. Following consultation with industry groups and members of the Judiciary, on 30 July 2014 Jackson LJ, Ramsey J and Master Hurst, the Senior Costs Judge, publicly endorsed the completed J-Codes in an open letter stating; "Developing the J-Codes to capture time recording information is an essential aspect of the implementation of the recommendations in the Final (Jackson) Report".
5. The next step is the creation of a bill format suitable for detailed assessment , capable of being automatically generated from the information already recorded using the J-Codes, suitable for manual preparation by legal practitioners (including Costs Lawyers) who do not have compatible (or any) time-recording software and

workable both electronically and on paper. Once tested and approved it can be adapted as appropriate for use in, for example, budgeting or summary assessment.

6. A prototype bill, using open XML standards to facilitate the translation of J-Code records into a bill, is at an advanced stage of preparation. Once the format has been finalised consultation will follow and, subject to judicial approval, the new bill will be piloted. It is hoped that a format can be presented to the judiciary for approval in the near future.
7. In the longer term it is intended that the new bill format will become the standard in all court proceedings and that the J-Codes will be expanded to facilitate that. There will be a need (as now) for some flexibility to accommodate different cases and circumstances but the essential phase/task/activity structure and compatibility with the J-Codes will, if the project is successful, become compulsory.

About the LEDES Oversight Committee

The **LEDES® (Legal Electronic Data Exchange Standard)** Oversight Committee (“LOC”) is an international, voluntary, not-for-profit organization comprised of legal industry representatives and is charged with creating and maintaining open standard formats for the electronic exchange of billing and other information between corporations and law firms. For more information, visit www.LEDES.org.

About UTMBS

The Uniform Task-Based Management System (UTBMS) is a series of codes used to classify the legal services performed by a law firm in an electronic invoice submission. For more information, visit www.UTBMS.com.