SOLICITORS' STARTER PACK

Bill preparation instructions

Receiving-party file handover

Blank template • England and Wales • Prepared 14 October 2026

Use this instruction sheet to brief a Costs Lawyer or draftsman. It is not a bill of costs, Precedent S or a notice of commencement.

Matter and contacts

[Claim number; parties; court; instructing solicitor; contact details]

Entitlement and timetable

[Attach sealed costs order/settlement; identify costs payable, basis, scope and any limits. Record dates of orders, relevant deadlines and payments on account.]

Retainer and funding

[Client care letter; rates/variations; CFA/DBA/ATE or legal aid documents where relevant; client liability; VAT recovery position.]

Records and disbursements

[Complete time ledger with grades, rates and date ranges; correspondence and documents; counsel/expert/court-fee invoices; identify missing records.]

Budgets and case history

[Approved/agreed budgets, variations, phase data and assumptions; short chronology and significant developments.]

Instructions and outstanding checks

[Confirm required bill format, evidence gaps, drafting deadline, offers and who will approve the draft. Transfer confidential documents securely.]

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Fictional worked example

Bill preparation instructions

All parties, facts and amounts below are invented. This is not a real case, approved precedent or promised outcome.

Matter

Fictional claim: Northmere Services Ltd v Willowbridge Trading Ltd. Instructing solicitor: [fictional contact]. No real claim number is used.

Costs entitlement

Illustrative sealed order: defendant to pay claimant's costs on the standard basis, assessed if not agreed. Attach actual wording when adapting.

File handover

Time ledger, retainer and rates, two counsel invoices, approved budget and variation are attached in this fictional scenario. An expert invoice is outstanding.

Action plan

Drafter to reconcile phases and invoice totals, check client liability and VAT recovery, and confirm the correct bill format. Solicitor to supply missing invoice and verify the commencement deadline before approval.

Before adapting

Replace every placeholder, verify the current rules and the actual order, reconcile all figures, and obtain legal review. Never file or serve the fictional example unchanged.

Rules reference: CPR Part 47 and Practice Direction 47 (justice.gov.uk); for settlement offers, CPR 44.2 and Part 36. Check current provisions before use.

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