Precedent H checking pack

Costs Lawyer | Prepared 12 November 2026

1. Phase assumptions — fictional case

A commercial multi-track claim outside the simplified budgeting pilots, two factual witnesses, one accounting expert and a three-day trial. These assumptions are examples, not a recommendation for your case.

Phase	Assumption / allocation check
Pre-action	Protocol investigation and correspondence already undertaken; separate work belonging to another phase.
Issue / statements of case	Claim, defence and reply; one substantive amendment anticipated.
CMC	One costs and case management conference; expert and disclosure directions contested.
Disclosure	Three custodians; approximately 2,000 documents requiring review; no non-party application priced.
Witness statements	Two factual witnesses; no interpreter required; one revision each.
Expert reports	One accounting expert, report, questions and joint discussion; no second discipline assumed.
PTR	One pre-trial review; ordered case summary and chronology where not prepared earlier.
Trial preparation	Three-day trial bundle; counsel brief fee; witness attendance arrangements.
Trial	Three-day trial, one advocate; refreshers and attendance distinct from brief fee.
ADR / settlement	One mediation with one advocate; further work depends on the case plan.

Use brief significant assumptions, not routine task lists. Written assumptions are not normally required where only the first page is lodged. Contingent work must fall outside the main categories and be more likely than not to be incurred.

2. Annotated calculation

Invented witness-statement phase. The rates below are fictional, not guideline rates or our charges.

Item	Hours	Rate	Amount
Incurred costs at ledger cut-off	—	—	£2,400
Estimated Grade B work	12	£250	£3,000
Estimated Grade D work	4	£140	£560
Estimated profit costs	—	—	£3,560
Estimated disbursements	—	—	£0
Combined phase total	—	—	£5,960

Separate incurred and estimated costs

£2,400 has already been incurred and is not part of the £3,560 estimated future allowance. Court approval of future costs does not approve this incurred figure.

Keep phase totals linked

Estimated costs: 12 × £250 + 4 × £140 = £3,560. Combined phase: £2,400 + £3,560 = £5,960. Check the front sheet against the phase sheet; do not double count.

Exclude the wrong items

Ordinary budget figures exclude VAT, success fees and ATE premiums. Budget preparation costs are not inserted in a draft phase. Expert permission work and trial attendance arrangements must be allocated under PD3D, not all placed in the expert phase.

3. Final checking sheet

1. Identify the court, claim type, issue date, track, stated value and any budgeting pilot.

2. Check the sealed directions. Ordinary CPR 3.13: below £50,000, file and exchange with the DQ; otherwise at least 21 days before the first CMC, unless ordered otherwise.

3. Check whether only the first page is required: total incurred and estimated costs not exceeding £25,000, or stated claim value less than £50,000.

4. Record the ledger cut-off and committed expenses, then reconcile incurred and estimated figures.

5. Match the witness, expert, disclosure and hearing assumptions to proposed directions.

6. Exclude VAT, success fees and ATE premiums; do not place budget preparation costs in draft phases.

7. Only include qualifying contingent costs more likely than not to be incurred.

8. Confirm senior legal representative approval and statement of truth.

9. For the ordinary route, diarise Precedent R no later than seven days before the first CMC.

10. Monitor phases after approval; consider prompt Precedent T for significant developments.

Official sources and limitations

CPR Part 3: https://www.justice.gov.uk/courts/procedure-rules/civil/rules/part03

PD3D:
https://www.justice.gov.uk/courts/procedure-rules/civil/rules/part03/practice-direction-3e-costs-management

Educational working aid only, not official Precedent H, legal advice or an approved precedent. Check current rules, pilot provisions and your order. Tom or Rob’s practitioner review is required before use. Obtain official H and R forms from GOV.UK.