Osprey Approach: Undertakings

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Sep 20th, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=43601

Designed to be used as its own "matter". Record standard and non-standard undertakings. Parties to the undertaking, discharge criteria and value if relevant, can be recorded and Key dates allow open undertakings to be monitored and kept on top of. Reports allow outstanding undertakings to be monitored by COLP to ensure that compliance is adhered too.

ALLOCATE A CUSTOM QUESTIONNAIRE

RELATED MATTER

Please enter the details of the matter to which the undertaking relates

Number of Related Matter

Name of Related Client

Department Undertaking relates

Please Select	⌄
Please Select	
Your Departments Here	

Office Undertaking Relates to

Please Select	⌄
Please Select	
Your Departments Here	

Fee Earner of Related Matter

Please Select	⌄
Please Select	
Your Fee Earners Here	

✓ Submit   Cancel

ALLOCATE A CUSTOM QUESTIONNAIRE

UNDERTAKING DETAILS

Date Undertaking Made

| Select a date | 📅 |

Undertaking Type

| Please Select | ⌄ |

| Please Select |
| Standard |
| Non-Standard |

Undertaking Category

| Please Select | ⌄ |

| Please Select |
| Monies Held to Order |
| Return of Documents |
| Payment of Our Costs |
| Payment of Third Party Costs |
| Discharge of Mortgage |
| Other |

Undertaking Given or Received

| Please Select | ⌄ |

| Please Select |
| Given |
| Received |

Who Undertaking Made to / Received from

| |

Person recording undertaking

| Please Select | ⌄ |

| Please Select |
| Your Staff Here |

Fee Earner responsible for Undertaking

| Please Select | ⌄ |

| Please Select |
| Your Fee Earners Here |

Undertaking Details

| |

NON-STANDARD UNDERTAKING

Has Non Standard Undertaking Been Approved by App

Please Select	⌄

Please Select
Yes
No
Not applicable

✓ Submit   Cancel

ALLOCATE A CUSTOM QUESTIONNAIRE

DISCHARGE DETAILS

If discharge is possible but delayed, select "Outstanding" If Discharge is not possible ever, please select "Discharge Not Possible"

Status of Undertaking

Please Select	⌄

Please Select
Outstanding
Discharged
Discharge Not Possible

✓ Submit   Cancel

ALLOCATE A CUSTOM QUESTIONNAIRE

DISCHARGE DELAYED

If discharge of undertaking has been delayed, update Anticipated Discharge Date below

Anticipated Date Due

Select a date	📅

✓ Submit   Cancel

ALLOCATE A CUSTOM QUESTIONNAIRE

DISCHARGE NOT POSSIBLE

Enter details including any actions performed, if the undertaking will not be discharged

Comments if Unable to be Discharged

✓ Submit   Cancel

ALLOCATE A CUSTOM QUESTIONNAIRE

DISCHARGE INFO

Date of Discharge

Select a date	🗓

Discharged By

Please Select	⌄

Please Select
Your Staff Here

✓ Submit   Cancel

Undertaking Note

UNDERTAKING – { MERGEFIELD UT_DISCHARGE_UT_STATUS }

Matter Details

Matter Number:	{ MERGEFIELD UT_DETAILS_UT_CL_MAT }
Fee Earner:	{ MERGEFIELD UT_DETAILS_UT_MAT_FE }
Client Name(s):	{ MERGEFIELD UT_DETAILS_UT_CL_NAME }
Department:	{ MERGEFIELD UT_DETAILS_UT_DEPT }
Office:	{ MERGEFIELD UT_DETAILS_UT_OFFICE }

Undertaking Details

Date Undertaking Made	{ MERGEFIELD UT_DETAILS_UT_DATE }
Undertaking Type	{ MERGEFIELD UT_DETAILS_UT_TYPE }
Undertaking Category	{ MERGEFIELD UT_DETAILS_UT_CAT }
{ IF **{** MERGEFIELD UT_DETAILS_UT_GIV_REC **}** = "Given" "Made to" "Received from" **}**	{ MERGEFIELD UT_DETAILS_UT_REC_MADE }
Recorded By	{ MERGEFIELD UT_DETAILS_UT_PER_REC }
Fee Earner Responsible	{ MERGEFIELD UT_DETAILS_UT_RES_FE }
Details of Undertaking	{ MERGEFIELD UT_DETAILS_UT_DETAILS }
Financial Value of Undertaking	{ MERGEFIELD UT_DETAILS_UT_FIN_VAL \# £#,##.00**}**
Discharge Criteria	{ MERGEFIELD UT_DETAILS_UT_DIS_CRIT }
Anticipated Discharge Date of Undertaking	{ MERGEFIELD UT_DETAILS_UT_ANT_DUE }
Client has Agreed the Undertaking?	{ MERGEFIELD UT_DETAILS_UT_CL_AGREE }
Undertaking Confirmed in Writing?	{ MERGEFIELD UT_DETAILS_UT_WRITING }
Undertaking Unambiguous?	{ MERGEFIELD "UT_DETAILS_UT_UNAMBIG" }
Non-Standard Undertaking Approved by Appropriate Person?	{ MERGEFIELD UT_DETAILS_UT_SUP_APP }

{ IF **{** MERGEFIELD UT_DISCHARGE_UT_STATUS **}** = "Outstanding" "" "Discharge Details**

Date of Discharge	{ MERGEFIELD UT_DISCHARGE_UT_DIS_DATE }
Discharged By	{ MERGEFIELD UT_DISCHARGE_UT_DIS_BY }
Comments as to why unable to be discharged	{ MERGEFIELD UT_DISCHARGE_UT_DIS_NOT_POSS }

"}

Notes