Osprey Approach: Employment - Settlement Agreements Employee

This help guide was last updated on
Mar 23rd, 2023

The latest version is always online at
https://support.ospreyapproach.com/?p=23042

Osprey™ Approach

SETTLEMENT - FIRST APPOINTMENT

Contribution from Employer?

Please Select

- Please Select
- Yes, full
- Yes, partial
- No
- Not applicable

Contribution from Employer (amount)

0.00

Contribution from Client?

Please Select

- Please Select
- Yes, full
- Yes, partial
- No
- Not applicable

Settlement Agreement received?

Please Select

- Please Select
- Yes
- No

Employment Start Date

Select a date

Employment Termination Date

Select a date

Submit Cancel

CLIENT DETAILS FW_EME

Client date of birth

Select a date

Client Salutation

Funding

Please Select

- Please Select
- Private
- Trade Union
- Legal Expenses
- No win no fee
- Public funding

Client gender

Please Select

- Please Select
- Male
- Female

Submit Cancel

EMPLOYER DETAILS FW_EME

Employer Company Name

Current Recipient

Please Select

- Please Select
- Dear Sirs
- Employer Contact 1
- Employer Contact 2
- Employer Contact 3
- Employer Contact 4

Employer Contact 1 Title

Employer Contact 1 Initials

Employer Contact 1 Forename

Employer Contact 1 Surname

Employer Contact 1 Email

Employer Contact 1 Tel

Employer Contact 1 at Main Address?

Please Select

- Please Select
- Yes
- No
- Not applicable

Employer Contact 1 Address

SETTLEMENT - FIRST APPOINTMENT

Contribution from Employer?

Please Select

- Please Select
- Yes, full
- Yes, partial
- No
- Not applicable

Contribution from Employer (amount)

0.00

Contribution from Client?

Please Select

- Please Select
- Yes, full
- Yes, partial
- No
- Not applicable

Settlement Agreement received?

Please Select

- Please Select
- Yes
- No

Employment Start Date

Select a date

Employment Termination Date

Select a date

Submit Cancel

CLIENT DETAILS FW_EME

Client date of birth

Select a date

Client Salutation

Funding

Please Select

- Please Select
- Private
- Trade Union
- Legal Expenses
- No win no fee
- Public funding

Client gender

Please Select

- Please Select
- Male
- Female

Submit Cancel

EMPLOYER DETAILS FW_EME

Employer Company Name

Current Recipient

Please Select

- Please Select
- Dear Sirs
- Employer Contact 1
- Employer Contact 2
- Employer Contact 3
- Employer Contact 4

Employer Contact 1 Title

Employer Contact 1 Initials

Employer Contact 1 Forename

Employer Contact 1 Surname

Employer Contact 1 Email

Employer Contact 1 Tel

Employer Contact 1 at Main Address?

Please Select

- Please Select
- Yes
- No
- Not applicable

Employer Contact 1 Address

EMPLOYMENT DATES FW_EME

Employment Start Date

Select a date

Employment Termination Date

Select a date

Date of Dismissal

Select a date

Years with Employer

Date from which Time Limit Runs

Select a date

Limitation Date

Select a date

Date last paid

Select a date

Notice Period (Contract)

Notice Period (Actual)

Submit Cancel

EMPLOYMENT FINANCIAL DETAILS FW_EME

Gross Salary (annual)

0.00

Gross Salary (monthly)

0.00

Gross Salary (weekly)

0.00

Net Salary (annual)

0.00

Net Salary (monthly)

0.00

Net Salary (weekly)

0.00

Payment Period

Please Select

- Please Select
- Weekly
- Monthly
- Other

London Weighting?

Please Select

- Please Select
- Yes
- No
- Not applicable

London Weighting Amount

0.00

Bonus?

Please Select

- Please Select
- Yes
- No

Bonus Amount

0.00

EMPLOYER DETAILS FW_EME

Employer Company Name

Current Recipient

Please Select

- Please Select
- Dear Sirs
- Employer Contact 1
- Employer Contact 2
- Employer Contact 3
- Employer Contact 4

Employer Contact 1 Title

Employer Contact 1 Initials

Employer Contact 1 Forename

Employer Contact 1 Surname

Employer Contact 1 Email

Employer Contact 1 Tel

Employer Contact 1 at Main Address?

Please Select

- Please Select
- Yes
- No
- Not applicable

Employer Contact 1 Address

SETTLEMENT – EMPLOYER CONTRIBUTION

Contribution from Employer?

Please Select

- Please Select
- Yes, full
- Yes, partial
- No
- Not applicable

Contribution from Employer (amount)

0.00

Contribution from Client?

Please Select

- Please Select
- Yes, full
- Yes, partial
- No
- Not applicable

Submit Cancel

EMPLOYER ENC SIGNED

SETTLEMENT AGREEMENT –

CONTACT 1

PRACCTICE
SOLICITORS

www.demoospreyapproach.com
enquiries@pracctice.com
Suite 1, Falstaff House
Malvern
WR14 1JJ
T: 0330 060 4940

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_TTL **} {** MERGEFIELD FW_EMPCONT_1_FW_EMP_CONT1_IN **} {** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_SN **}**

Dear **{** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_TTL **} {** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT1_SN **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

EMPLOYER ENC SIGNED

SETTLEMENT AGREEMENT –

CONTACT 2

PRACCTICE
SOLICITORS

www.demoospreyapproach.com
enquiries@pracctice.com
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Malvern
WR14 1JJ
T: 0330 060 4940

i

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Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_TTL **} {** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_IN **} {** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_SN **}**
{ MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_ADD **}**

Dear **{** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_TTL **} {** MERGEFIELD FW_EMPCONT_1_FW_EMPCONT2_SN **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

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Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

EMPLOYER ENC SIGNED

SETTLEMENT AGREEMENT –

CONTACT 3

PRACCTICE
SOLICITORS

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enquiries@pracctice.com
Suite 1, Falstaff House
Malvern
WR14 1JJ
T: 0330 060 4940

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_TTL **} {** MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_IN **} {** MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_SN **}**
{ MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_ADD **}**

Dear **{** MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_TTL **} {** MERGEFIELD FW_EMPCONT_2_FW_EMPCONT3_SN **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

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In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

EMPLOYER ENC SIGNED

SETTLEMENT AGREEMENT –

CONTACT 4

PRACCTICE
SOLICITORS

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Malvern
WR14 1JJ
T: 0330 060 4940

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD FW_EMP_WITDET_2_FWWIT4TITLE **} {** MERGEFIELD FW_EMP_WITDET_2_FWWIT4INTS **} {** MERGEFIELD FW_EMP_WITDET_2_FWWIT4SURNAME **}**
{ MERGEFIELD FW_EMP_WITDET_2_FWWIT4ADDRESS **}**

Dear **{** MERGEFIELD FW_EMP_WITDET_2_FWWIT4TITLE **} {** MERGEFIELD FW_EMP_WITDET_2_FWWIT4SURNAME **}**

Re: { MERGEFIELD LINKNAME_FORENAME_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

EMPLOYER ENC SIGNED

SETTLEMENT AGREEMENT –

COMPANY

PRACCTICE
SOLICITORS

www.demoospreyapproach.com
enquiries@pracctice.com
Suite 1, Falstaff House
Malvern
WR14 1JJ
T: 0330 060 4940

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM **}**
{ MERGEFIELD FW_EMPLOYER_FW_EMPR_MN_ADR **}**

Dear Sirs

Re: { MERGEFIELD LINKNAME_FORENAME_1 } { MERGEFIELD LINKNAME_SURNAME_1 }

We have advised the above-named client in connection with the Settlement Agreement entered into with the company. The agreement has been signed and dated by **him/her** with the declaration completed.

Please find enclosed two original signed copies of the Agreement. We should be grateful if you could please sign both copies of the Agreement and then forward one original signed copy of the Agreement to us, duly signed by both parties.

In addition, we enclose this firm's invoice for settlement in accordance with the agreement.

Yours faithfully

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

FIRST APPOINTMENT CHECKLIST

FIRST APPOINTMENT CHECKLIST

Date Client Called: **{** ASK Date "Date Client Called?" \d " " **}{** ref Date * MERGEFORMAT **}**	Details taken by: **{** ASK Details "Client Details Taken By?" \d " " **}{** ref Details * MERGEFORMAT **}**

Full Name:	**{** MERGEFIELD LINKNAME_FORENAME_1 **}** **{** MERGEFIELD LINKNAME_SURNAME_1 **}**
Address:	**{** MERGEFIELD CALCULATION_ADDRESS **}**

Telephone Home: **{** MERGEFIELD CALCULATION_PHONE **}**	Work:
Mobile: **{** MERGEFIELD CALCULATION_MOBILE **}**	Email: **{** MERGEFIELD MATTER_EMAIL_ADDRESS **}**

Date of Birth:	**{** MERGEFIELD FW_CLI_INFO_EME_FW_CLI_DOB **}**	Conflict Check : Previously had free ½ hour:	YES/NO YES/NO

Employer:	**{** MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM **}**
Address:	**{** MERGEFIELD FW_EMPLOYER_FW_EMPR_MN_ADR **}**

Start Date: **{** MERGEFIELD FW_EMP_TRMS_DTS_FW_EMP_START_DT **}**	Last day of Employment: **{** MERGEFIELD FW_EMP_TRMS_DTS_FW_EMP_TERM_DT **}**

Brief Details of Matter:	**{** MERGEFIELD MATTER_MATTER_DESCRIPTION **}**

ORIGIN OF CLIENT: existing/recommended/CAB/Internet/Yellow Pages/Lloyd Green- News Quest/Other

APPOINTMENT DETAILS:

Date: **{** ASK Appdate "Client Appointment Date?" \d " " **}{** ref Appdate * MERGEFORMAT **}**	Time: **{** ASK Apptime "Client Appointment Time?" \d " " **}{** ref Apptime * MERGEFORMAT **}**
Free ½ Hour/Private Client/LSC	(If app exceeds 30 mins charge £100 + VAT & then hourly rate)

(Senior)	**(4 yrs +)**	**(3-4 yrs)**	**(1-2 yrs)**	**Newly qualified**	**(Trainee)**	**Paralegals**

Advised: Bring in all documentation relating to the matter e.g. contract, wage slips, company handbook, correspondence with employer.

ID to be provided: 1 photo ID & 1 address ID (no more than 3 months old)
If no photo ID then two address IDs.

CLIENT CONFIMING SETTLEMENT

AGREEMENT SENT TO

EMPLOYER

PRACCTICE
SOLICITORS

www.demoospreyapproach.com
enquiries@pracctice.com
Suite 1, Falstaff House
Malvern
WR14 1JJ
T: 0330 060 4940

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_INITIALS_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**
{ MERGEFIELD CALCULATION_ADDRESS **}**

Dear **{** MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**

Re: Settlement Agreement with { MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM }

I refer to our recent meeting when we went through the Settlement Agreement**. I understand you requested voluntary redundancy, and on that basis I believe the settlement that you have received is fair and in accordance with or excess of your normal statutory entitlement.**

You confirmed your understanding of the Agreement and that the compensation payment being paid to you was in full and final settlement of all claims you might otherwise have been able to argue against your employers relating to the termination of your employment.

I confirm that I have sent two original signed copies of the Agreement to your employers and I will forward one original version of the Agreement for your records once received. I have also sent your employers my invoice and once that is settled this matter will be at an end.

Once my invoice is settled I will take steps to close your file of papers. Please note that your file will be kept in our archives for a period of 6 years should you need to refer to them in the future. [In the meantime I return the papers you kindly supplied to me.]

I wish you all the best with your job search and if I or anyone in the firm can be of any further assistance to you in the future please do not hesitate to contact us.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

CLIENT ENCLOSING SIGNED

SETTLEMENT AGREEMENT

PRACCTICE
SOLICITORS

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Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_INITIALS_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**
{ MERGEFIELD CALCULATION_ADDRESS **}**

Dear **{** MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**

Re: Settlement Agreement with { MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM }

For your records, please find enclosed an original signed copy of the Settlement Agreement entered into with your former employer.

Once **you and** your employer **has**/**have** settled my invoice**(s)** I will arrange to close your file. Please note that your file will be kept in our archives for a period of 6 years in case reference is required to it in the future.

In order for us to keep improving our services, we should be grateful if you could complete the enclosed Client Satisfaction Survey and return it to us with your comments.

If I can be of any further assistance in the future please do not hesitate to contact me.

Thank you for your kind instructions in this matter.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

CLIENT LETTER CONFIRMING

APPOITMENT

PRACCTICE
SOLICITORS

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enquiries@pracctice.com
Suite 1, Falstaff House
Malvern
WR14 1JJ
T: 0330 060 4940

Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_INITIALS_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**
{ MERGEFIELD CALCULATION_ADDRESS **}**

Dear **{** MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Further to our earlier telephone conversation I write to confirm your appointment at **{** ASK Apptime "Client Appointment Time?" \d " " **}{** ref Apptime **}** on **{** ASK Appdate "Client Appointment Date?" \d " " **}{** ref Appdate **}**.

You are entitled to a free 30 minute consultation, if the appointment exceeds the initial 30 minutes there is a fixed charge of £100 plus VAT for a further 30 minutes instruction and beyond this the Solicitor fee applies. If you think you have legal expenses cover on your insurance policy, please bring proof of this with you.

Please bring with you one form of photo ID and one form of address ID that is no older than 3 months and any documents you have relating to your matter.

If you require any further instruction on how to reach us or any further information before your appointment please do not hesitate to contact us.

If you have any problems attending your appointment please inform us as soon as you can.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

CLIENT RULE 15 LETTER

PRACCTICE
SOLICITORS

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Our Ref: **{** MERGEFIELD MATTER_FEE_EARNER_ID **}/{** MERGEFIELD client_no **}/{** MERGEFIELD matter_no **}**

Your Ref:

{ SET LETTER**{** DATE \@ "d MMMM yyyy" **} }{**ref LETTER \@ "d MMMM yyyy" \ * MERGEFORMAT **}**

{ MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_INITIALS_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**
{ MERGEFIELD CALCULATION_ADDRESS **}**

Dear **{** MERGEFIELD LINKNAME_TITLE_1 **} {** MERGEFIELD LINKNAME_SURNAME_1 **}**

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Thank you for instructing this firm to handle your above matter. I will do my best to ensure everything proceeds as quickly as possible.

Responsibility for the work

[ ]

I will ensure that I explain the issues raised in your matter and keep you informed of the progress. I will advise you whether the likely outcome of the case will justify the likely charges and expenses and the risks involved, from time to time where necessary.

Work to be carried out for you

I will advise and assist you with your employment matter against **{** MERGEFIELD FW_EMPLOYER_FW_EMPR_CO_NM **}** with a view to negotiate settlement by sending an open letter along with a without prejudice letter and discussing any responses with you.

Legal Expenses

[ ]

Fees

My fees are calculated by reference to the time spent by me and other solicitors dealing with this matter. All time spent on your file is recorded at a rate per hour. This includes advising, attending on you and others, dealing with papers, correspondence, telephone calls, travelling and waiting time.

[ ]

Tribunal Fees

Please note that as of 29th July 2013 you are likely to have to pay fees in the Employment Tribunal. You will be provided with details where necessary.

Estimate

At the current stage we are unable to provide you with an estimate. As explained during our appointment this will depend on how your employer reacts to this.

Money Laundering

[ ]

From 15th December 2007, solicitors have been obliged by HM Treasury to carry out a complex and risk-assessed search against every new client for transactions to protect against fraudulent activity and money laundering.

Orders for costs

At the conclusion of this matter, and in the event that you are successful, it may be that you will be entitled to the payment of your costs by some other party. However, it is rare for the system of “taxation of costs” as it is known, to result in the other party having to pay the full costs you have incurred. Further it is rare for employment tribunals to make orders for costs save in exceptional circumstances. You should be aware that you are primarily responsible for the payment of our fees.

Professional Indemnity

We can confirm that our practice currently has professional indemnity insurance in place.

Telephones

Please note that all of our calls are recorded for training and quality purposes.

Terms of Business

[ ]

If there is anything that is not clear, please let me know as soon as possible.

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }