



Osprey Approach: PII Claims and Circumstances

This help guide was last updated on
Jul 25th, 2024

The latest version is always online at
<https://support.ospreyapproach.com/?p=43603>

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Designed to be used as its own “matter”. Record PII Claims and circumstances in osprey, recording related matter details, parties and details of the purported error and losses. Record findings of your investigations and details of any settlements. Reports allow COLP/COFA and senior management to monitor claims and being able to report by date allows for easier completion of PI renewals and accreditations.

ALLOCATE A CUSTOM QUESTIONNAIRE

RELATED MATTER

Related Matter Number (If Relevant)

Fee Earner of Matter

Please Select ▼

Please Select

Your Fee Earners Here

Department

Please Select ▼

Please Select

Your Departments Here

Branch

Please Select ▼

Please Select

Your Branches Here

Practice Area

Please Select ▼

Please Select

Conveyancing

Wills

Probate

Related Complaint Number (If Relevant)




Submit

Cancel

CLAIM DETAILS


Internal Claim Handler

Please Select 

Please Select

Your Staff Here

Claim Type





Please Select 

Please Select

Claim


Circumstance

Claimant

None selected    

None selected

Claimant(s) Status

Please Select 

Please Select

Client


Executor

Beneficiary

Date Identified

Select a date 


Identified By

Please Select 

Please Select

Your Staff Here

Date Purported Error Occurred

Select a date 

Summary of Claim or Circumstance

Details of Proceeding Events

Description of Purported Loss

Additional Defendant(s) (If Any)

CLAIM INVESTIGATION

Claimant

None selected ▼ 🔍 ✎ +

None selected

Claimant(s) Status

Please Select ▼

Please Select

Client

Executor

Beneficiary

Date Purported Error Occurred

Select a date 📅

Summary of Claim or Circumstance

Details of Proceeding Events

Description of Purported Loss

Additional Defendant(s) (If Any)

Report to the Insurers Required

Please Select ▼

Please Select

Yes

No

Not applicable

PI Claim Investigation Complete

Please Select ▼

Please Select

Yes

No

Not applicable

✓ Submit Cancel

INSURER DETAILS

Insurer

None selected ▼ 🔍 ✎ +

None selected

Insurer Contact

None selected ▼ 🔍 ✎ +

None selected

Insurer & Policy Number

Please Select ▼

Please Select

Insurer Name - Policy No

Policy Year

Please Select ▼

Please Select

2016 - 2017

2017 - 2018

2018 - 2019

2019 - 2020

2020 - 2021

2021 - 2022

2022 - 2023

Insurer Reference

✓ Submit Cancel

ADVICE RECEIVED

Details of Insurers Advice

Insurer Reference

Insurers Solicitors

None selected ▼ 🔍 ✎ +

None selected

Insurers Solicitors Contact

None selected ▼ 🔍 ✎ +

None selected

Insurers Solicitors Reference

Excess Payable

Insurers Loss Reserve

Defence Costs Paid so far

Claim Status

Please Select ▼

Please Select

Open - Not Reported

Open - Reported to Insurers

Closed - Not Reported

Closed - Reported to Insurers

✓ Submit Cancel

ADVICE RECEIVED

Details of Insurers Advice

Insurer Reference

Insurers Solicitors

None selected ▼ 🔍 ✎ +

None selected

Insurers Solicitors Contact

None selected ▼ 🔍 ✎ +

None selected

Insurers Solicitors Reference

Excess Payable

Insurers Loss Reserve

Defence Costs Paid so far

Claim Status

Please Select ▼

Please Select

Open - Not Reported

Open - Reported to Insurers

Closed - Not Reported

Closed - Reported to Insurers

✓ Submit Cancel

SETTLEMENT OFFER

Financial Offer for Settlement

0.00

Other Resolution Offered



Submit

Cancel

CLAIM UPDATE

Summary of Claim or Circumstance

Details of Proceeding Events

Description of Purported Loss

Additional Defendant(s) (If Any)

Financial Settlement Demanded

0.00

Other Resolution Demanded

Proceedings Issued

Please Select



Please Select

Yes

No

Not applicable



Submit

Cancel

CLOSING DETAILS

Date Closed

Final Financial Claim Settlement

Final Resolution Offered

Date Claim Paid

Remedial Action Taken

Blank Letter to Insurer

{INCLUDETEXT

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

Your Ref:

{ QUOTE { DATE \@ "d MMMM yyyy" } }

{ MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_title } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_initials } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_surname }
{ MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_address }

Dear { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_title } { MERGEFIELD PII_CLAIM_DET_PII_CLAIMANT_surname }

Re: { MERGEFIELD MATTER_MATTER_DESCRIPTION }

Yours sincerely

{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME*UPPER }

{INCLUDETEXT

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Letter to Insurers solicitors

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

Your Ref: { MERGEFIELD PII_INSURER_PII_INS_SOL_REF }

{ QUOTE { DATE \@ "d MMMM yyyy"} }

{ IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_S_name }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_S_address }" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_initials } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_compname }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_address }
}

Dear { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "Sirs" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }" }

Re: { MERGEFIELD PII CLAIM DET PII CLAIMANT forename } { MERGEFIELD PII CLAIM DET PII CLAIMANT surname } - { MERGEFIELD PII INSURER PII INS SOL_REF }

Yours { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "faithfully" "Sincerely" }

**{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME}*UPPER }**

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Letter to Claimant

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

Your Ref: { MERGEFIELD PII_INSURER_PII_INS_SOL_REF }

{ QUOTE { DATE \@ "d MMMM yyyy" } }

{ IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_S_name }
{ MERGEFIELD PII_INSURER_PII_INS_SOL_S_address }" "{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_title } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_initials } { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname }
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{ MERGEFIELD PII_INSURER_PII_INS_SOL_CON_address }
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Yours { IF { MERGEFIELD PII_INSURER_PII_INS_SOL_CON_surname } = "" "faithfully" "Sincerely" }

**{ MERGEFIELD CALCULATION_FEE_EARNER_DESCRIPTION }
{ MERGEFIELD PRACTICEINFO_PRACTICE_NAME}*UPPER }**

{INCLUDETEXT

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