

Osprey Approach: PII Claims and Circumstances

This help guide was last updated on
Aug 6th, 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

--

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

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

0.00

Insurers Loss Reserve

0.00

Defence Costs Paid so far

0.00

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

Select a date

Final Financial Claim Settlement

0.00

Final Resolution Offered

Date Claim Paid

Select a date

Remedial Action Taken



Submit

Cancel

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 }

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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_SOLS_name }
{ MERGEFIELD PII_INSURER_PII_INS_SOLS_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 }
}

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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 }**

{INCLUDETEXT

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