



Osprey Approach: Performing a Conflict of Interest Search (App)

This help guide was last updated on
Feb 1st, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=52065>



A Conflict Check is available in Osprey to ensure that you do not add a client who is already present on the system, or another side in the relevant case.

Conflict of interest searches should be carried out whenever you add a new matter in order to ensure that the other side is not already listed as a client on your system.

To run a Conflict of Interest Search,

Using the Case Management App

The screenshot displays the Osprey Approach Case Management application interface. At the top, there is a header bar with the title "Osprey Approach Case Management" and a user profile for "neil". Below the header, a sidebar on the left contains various navigation icons. The main content area shows a matter titled "0 VAT Rate Bill" and "Client/Matter - B00002/1 (Braithwaite Neil/Default Matter) FE: CM WT: CPUR". A row of action buttons is visible, with "Conflict of Interest" highlighted by a red rectangular box. Other buttons include "Change Client/Matter", "Email", "Enable Client Web Access", "Send SMS", "Document Production", "Add Matter", "Edit Matter", "Client Contact Details", "Dossier Matter Level", "Notes Matter Level", "Client Details", and "Archive". Below the action buttons, a list of metadata fields is shown, including "Print", "Branch" (Malvern), "Department" (Conveyancing), "Fee Earner" (Craig Matthews), "Supervising Fee Earner" (N/A), "Work Type" (Convey Purchase), "Private/Legal Aid" (Private), "La Version" (N/A), "Franchise Category" (N/A), "Unique File No" (N/A), and "Remuneration Type" (Standard Remuneration). At the bottom right, there is a virtual assistant prompt: "I'm Posit, your virtual assistant! Please, tell me what you want to do..." with a microphone icon.

Select Clients & Matters > Conflict of Interest

Client Search

To search for duplicate Client details, ensure that the radio button is highlighted as below

- Client
- Dossier
- Client & Dossier

Then select the Next button.

Enter the details you wish to check for. Please note that you will need to select the toggle switch 'Include Archives' to search archived files.

A supervisor level user will be able to edit a system switch, to allow archived files to be included in the conflict search by default, rather than the user having to toggle the switch.

Surname	<input type="text"/>
Initials	<input type="text"/>
Forename	<input type="text"/>
House	<input type="text"/>
Post Code	<input type="text"/>
Fee Earner	<input type="text" value="Any"/> ▾
Work Type	<input type="text" value="Any"/> ▾
Matter Description	<input type="text"/>
Include Archives	<input checked="" type="checkbox"/>

Select 'Search' to perform the search and bring up the conflicts.

Using the Case Management App

Conflict of interest - Osprey Approach Case Management

Conflict of interest - B00002/1 (Braithwaite Neil/Default Matter)

Client search found **2 possible conflicts**. Client Filters: Name: Johnson Forename: % Matter: % Street: % Town: % Inc Archives: Y

CLIENT	MATTER	INITIALS	SURNAME	FORENAME	MATTER DESCRIPTION	FEE EARNER	WORKTYPE	P/LA	SELECT
J00001	1	RJ	Johnson	Rob	CRIME WT - Default Ma	RJ	CRIME	P	<input checked="" type="checkbox"/>
J00033	1		Johnson	Boris	Default Matter	ADAMB	GLOBAL	L	<input checked="" type="checkbox"/>

[Save](#) [Back](#)

Click Save to Save the results

You may also click on the Select icon to go to the relevant matter overview.

Dossier Search

We will now look at the Dossier search. Highlight the Dossier radio button and select Next.

- Client
- Dossier
- Client & Dossier

Select the page and field you wish to search by selecting the relevant entries in the drop-down lists. Then select a Search Type.

EQUAL To will return results that exactly match the specified criteria.

LIKE will return results that include the specified criteria but are not necessarily an exact match.

Place the data you wish to search for into the Value box.

Dossier Page	0 - All fields	▼
Dossier Field	Address_0	▼
Search Type	EqualTo	▼
Value	<input type="text"/>	
Logical Operator	And	▼

[+ Add](#)

Then select 'Add'.

Your search will appear here. You may add more criteria if you wish.

DOSSIER PAGE ID	DOSSIER FIELD ID	FILTER	ACTIONS
TK_CLI_GENINFO	TK_GENDER	= 'Male'	✎ 🗑️

You may refine your criteria search if you wish. The AND setting will enable you to search for results matching all set criteria.

Alternatively, use OR if you wish to find matches for more than one criteria.

Click Search to run the search. As with the Client search, you can now save to the Matter History should you wish.

Client & Dossier Search

You are also able to run a combined Client and Dossier Search, which will first ask for client details to search by, then will go through the dossier search directly afterwards. This option can be used to find a specific client and other side combination.

Remember, the conflict searches DO NOT search archived matters by default, so you must select them if you wish to include them in your search results.

There are also other ways to [search for clients](#)