

Osprey Approach: Using DocuSign (App)

This help guide was last updated on
Dec 28th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=52884>

[Click here for a printer-friendly version](#)



You will need an active subscription with DocuSign to be able to benefit from Osprey's DocuSign integration.

Clients will need access to the client web portal to be able to sign in and review any pending signature requests.

Logging in


To sign into DocSign, left-click Case Management. This will load the Documents tab.
Select a word document you wish to request a signature on, and select Request Signature (DocuSign)

KEYDATES

DOCUMENTS

WORKFLOWS

[+ Add Document](#) [+ Add Note](#)

 [Request Signature \(DocuSign\)](#)

☐ Global

A pop-up window will appear, asking for you to sign into DocuSign.

Sign with DocuSign - Osprey Approach (3.0.1) — □ ×

Close

DocuSign®

Log In

Email *

NEXT

[No account? Sign up for free](#)

Complete signing in, and once completed, you will see the DocuSign Request Signature window.

Sending a Request

After you have initially signed in, you will be taken directly to the DocuSign Request Signature window when requesting a signature.

A list of any clients or linked associates will be available to select. Confirm any additional required signers, and click Send.

OSPREY BROWSER

OSPREY HOME

CLIENT & MATTERS

TIME RECORDING

CASE MANAGEMENT

CLIENT LEDGERS

BANKS & JOURNALS

REPORTS

SUPERVISOR

Today's Units: 0

Today's Time: 00h:00m

Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Home - P00052/1 (Practice Osprey/Purchase of 354 Hulk Avenue) FE: AEH WT: FW_RCP

MATTERS FOR REVIEW

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	REVIEW DATE	TYPE	PERIOD	TIME LMD	LMD	SUP F/E
D00019	10	Douglas Dave	CRIME: Theft	DD			14		05/07/2021	
D00019	22	Douglas Dave	IMMIGRATION: Visa Application	DD	29/11/2022		0		05/05/2019	
D00058	7	Drummond Samuel	EMPLOY: Unfair Dismissal	DD	16/12/2022		0		04/12/2019	
P00044	2	Price Dominic	WILL: Mirror Will	DD	16/12/2022		0		12/09/2022	
S00069	11	Stevens Jamie	PROBATE: Estate of late James Stevens	DD	17/12/2022		0		14/07/2020	
P00044	9	Price Dominic	PERS INJURY: Litigation	DD	21/12/2022		0		02/01/2023	
P00044	13	Price Dominic	PURCHASE: 1711 Leek Road, Stoke ST2 7AA	DD	22/12/2022		0		12/09/2022	
P00044	15	Price Dominic	SALE: 73 High Street, Twickenham, TW11 8PM	DD	17/01/2023		5		28/07/2022	

YOUR KEY DATES

CLIENT	MATTER	CLIENT NAME	MATTER DESCRIPTION	F/E	KEY DATE	TYPE	NOTES	SUP F/E
D00058	1	Drummond Samuel	SALE: 98 Thames Street, TW12 FE	DD	24/03/2022	CHASECLI	CHASE CLIENT - Ensure Documents Received.	
P00044	11	Price Dominic	SALE: 12 High Street, Hampton, TW11 8PM	DD	08/09/2022	REMINDER	PREP: Contract Pack	
P00044	8	Price Dominic	DIVORCE: Price v Price	DD	16/12/2022	CHASESOL	Awaiting response from o/s solicitor	
P00044	2	Price Dominic	WILL: Mirror Will	DD	16/12/2022	02CCD	Client needs to confirm attendance at Court	

Signing a Document

The Document will then be available from the Client Web Portal.

The Client will need to sign in and navigate to the DocuSign area.

Any pending requests, as well as completed requests, will be visible to Sign or View respectively.

Current casesMy detailsNew enquiryFile Sharing/UploadContact

Purchase of 354 Hulk Avenue

Handled by Alex HiscuttResidential Purchase

Status2 Documents0 Messages3 DocuSignContact

Show 10 entriesSearch:

Status	Documents	Actions
Completed	Client care letter	
Pending	Blank doc	
Pending	Blank Doc 2	

Showing 1 to 3 of 3 entriesPrevious1Next

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Once the document has been signed by all signees, the completed document will then be uploaded as a PDF into the matter history.

Osprey Approach (3.0.1)

OSPREY BROWSER

OSPREY HOME

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+

TIME RECORDING

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REPORTS

+

SUPERVISOR

+

Today's Units: 0
Today's Time: 00h:00m
Today's Value: £0.00

Global search

00:00:00

Workflow Status Bar

Case Management - P00052/1 (Practice Osprey/Purchase of 354 Hulk Avenue) FE: AEH WT: FW_RCP

Change Client/Matter Email Conflict of Interest Enable Client Web Access Send SMS Document Production

KEYDATES DOCUMENTS WORKFLOWS

+ Add Document + Add Note Request Signature (DocuSign) Global

In Tray Items

Matter History

Call Credit Reports

Client Correspondence

Contracts

Court Forms

Emails

Forms

Key Documents

My folder

Personal Injury

Proof of Identification

Quotations

Requests for Information

Scanned Documents

Signature Requests

TYPE	REF NUMBER	CLIENT NO	CLIENT SURNAME	MATTER NO	DETAILS	CREATED DATE
	37052	P00052	Practice	1	Blank Doc 2	21/12/2022
	37051	P00052	Practice	1	Sent a text message to the number 00447581394488 ~...	21/12/2022
	37050	P00052	Practice	1	Sent a text message to the number 00447755140235 ~...	21/12/2022
	37049	P00052	Practice	1	Sent a text message to the number 00447881304147 ~...	21/12/2022
	37048	P00052	Practice	1	Client care letter	21/12/2022
	37047	P00052	Practice	1	Blank doc	20/12/2022

I'm Posit, your virtual assistant! Please, tell me what you want to do...