

Osprey Approach: Using DocuSign (App)

This help guide was last updated on
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The latest version is always online at
<https://support.ospreyapproach.com/?p=52884>

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This guide will take you through using the DocuSign integration with our case management app

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 DocuSign, 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

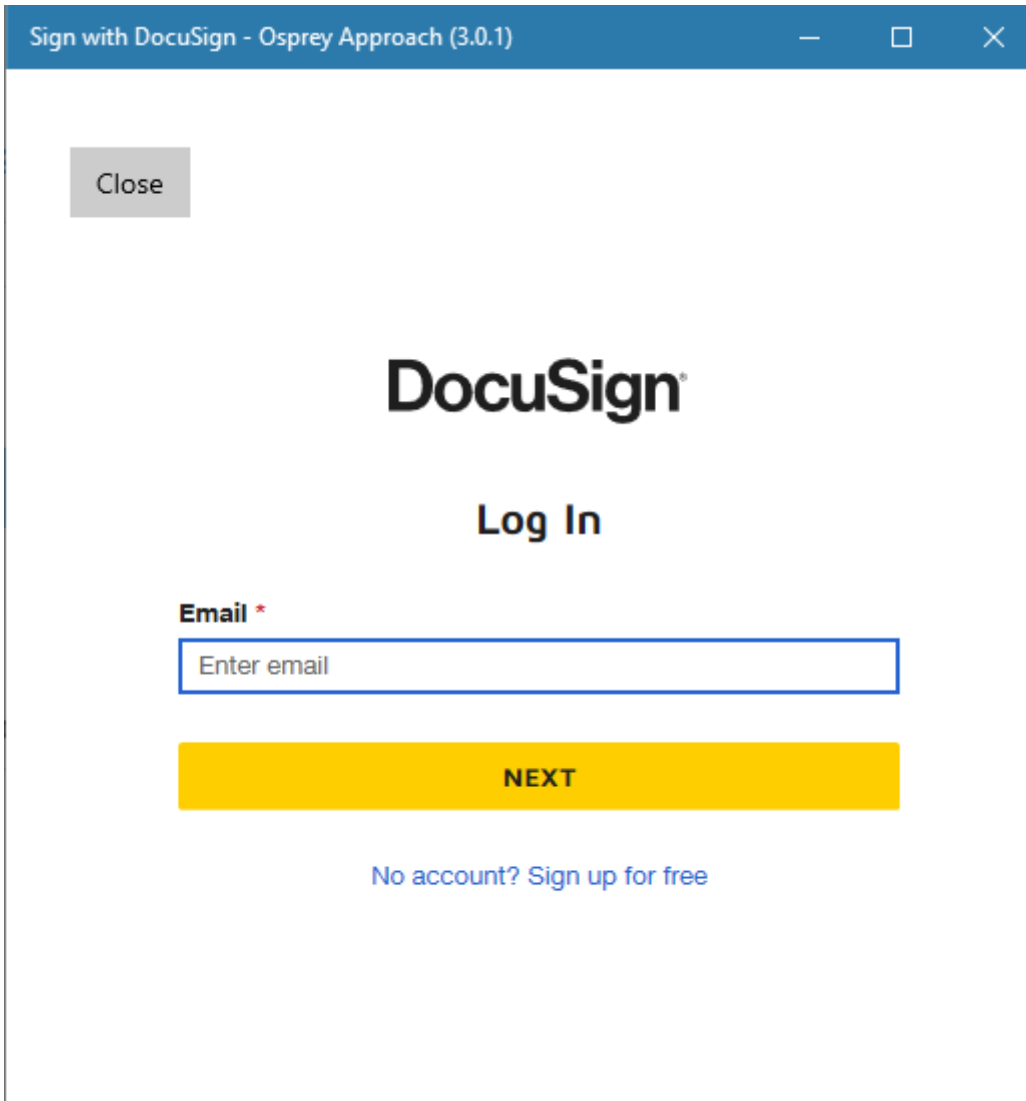
WORKFLOWS

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

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

Global

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



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.

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 | O2CCD | 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.

https://sales.portal.ospreyapproach.com/main/publisher/docuSign?clientNo=P00052&matterNo=1

Current cases My details New enquiry File Sharing/Upload Contact

Purchase of 354 Hulk Avenue

Handled by Alex Hiscutt Residential Purchase

/\ Status 2 Documents 0 Messages 3 DocuSign Contact

Show 10 entries Search:

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

Showing 1 to 3 of 3 entries Previous 1 Next

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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 BROWSER
- OSPREY HOME
- CLIENT & MATTERS +
- TIME RECORDING +
- CASE MANAGEMENT +
- CLIENT LEDGERS
- BANKS & JOURNALS +
- REPORTS +
- SUPERVISOR +







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

| 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 |

- 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