

Osprey Approach: Export Civil Legal Aid reports

This help guide was last updated on
Jul 10th, 2020

The latest version is always online at
<https://support.ospreyapproach.com/?p=17621>

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



You can generate an importable CSV file for upload to the LAA portal for Civil work.


Set up the system

Firstly, set up your client and matter. This must have all of the following filled:

- Client forename and surname in the Matter Details
- UFN (Unique File Number) in the Matter Details
- Franchise Category (licensed and set to type Civil in Supervisor > Code Setup > Franchise Categories)
- Remuneration type which relates to civil work
- Time recording entries and ledger entries as relevant

Now, ensure you have filled in the following Contract Work Pages (Case Management > Contract Work Forms):


CONTRACT WORK

Select Form Required: Personal Data ▼  Edit

Age	<input type="text" value="30"/>	Ethnic Origin	<input type="text" value="01 - White British"/>
Client Date of Birth	<input type="text" value="20/02/2019"/>	Gender	<input type="text" value="Male"/>
Disability Monitoring	<input type="text" value="Y"/>		

The Date Concluded is used when running the report to determine which matters to show:



CONTRACT WORK

Select Form Required: Civil Contract Work   Edit

Area of Law	MAT - Family	Date Concluded	20/02/2019
Unique Client No		Matter Type 1	FAMA - Divorce/Judicial
Matter Type 2	FADV - Client is seeking a	Stage Reached	BA - First meeting
End Point 2(obsolete)		Outcome Code	FD - Client referred to me
Tolerance Indicator	Yes	Case Stage level	FPL01 - Test
Value of Costs/Damage Recovered	100.00	Local Authority Number	124351
Client Type	P - Parent	Adjourned Hearing Fee	0.00
Additional Travel Payments	Y - Yes	Meetings Attended?	MEET01 - 1
Detention Centre	Please Select	CMRH/Oral Phone	Please Select
Procurement Area	PA00137 - Midlands & East	Access Point	AP00152 - Greater Nottin

And if relevant, depending on the type of work:


CONTRACT WORK

Select Form Required: Civil Immigration   Edit

AIT Hearing Centre		Home Office UCN		
Substantive Hearing		CMRH oral		
CMRH telephone		HO Interview		
Immigration CLR Code		Immigration CLR Date		Legacy Case <input type="text"/>
Claim Type		Prior Authority Ref		

CONTRACT WORK

Select Form Required:

Associated CLS 

 Edit

Class	<input type="text"/>	Stage Reached	<input type="text"/>
Outcome Code	<input type="text"/>	Offence Code	<input type="text"/>
Number of Suspects	<input type="text"/>	No Police/Court Attendances	<input type="text"/>
Police/Court Ident	<input type="text"/>	Duty Solicitor	<input type="text"/>
Youth Court	<input type="text"/>		

Navigate to Supervisor > System Setup > Branches and ensure that your branches have the LAA Supplier number and CLS Schedule number set:



Save



Cancel



This branch cannot be archived because is linked to live matters.

Branch Description:

Malvern

Branch
Weighting(%):

100.00

Location:

Non-London



TM User Id:

LAA Supplier No:

CRM Contract No:

CRM Schedule No:

CLS Schedule No:

VAT No:

Run the reports

Navigate to Reports > Miscellaneous > Contract Work, and choose the report you want to print:

REPORT PARAMETERS

☒ Run

Report:	<div>Controlled Matter Start</div>
Start Date:	<div>Controlled Matter Start</div> <div>Consolidated Matters - FamH</div> <div>Immigration Reports</div> <div>Consolidated Matters - MenH</div> <div>Consolidated Matters - TFF</div> <div>CRM 6 & CRM 11 - Contract Work Reports</div> <div>CRM 7 - NS Fee Contract Work</div>

Select the Start Date, Branch and Currency as relevant, then click Run:

REPORT PARAMETERS

☒ Run

Report:	<div>Consolidated Matters - FamH</div>
Start Date:	<div>07/07/2020</div>
Branch:	<div>Malvern</div>
Currency:	<div>Pound Sterling</div>

The report will open, you can print it if required, and Export to CSV for online submission:

[Reload Data](#) | [Print Page](#) | [Print All](#) | [Export For Online Submission](#)

The printer settings will need to be changed to Landscape to print this report properly

Office Schedule No: / /

FamH- Consolida

Case Reference Number	Case Start Date	Case ID	UFN	Client Forename	Client Surname
C00040/1	20/02/2019	001	200219/001	Chelsea	Campbell (Test Civil 1 &