



# 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>



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

## Set up the system


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


And if relevant, depending on the type of work:

CONTRACT WORK ▼

Select Form Required: Civil Immigration ▼  Edit


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

## 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:	Controlled Matter Start
Start Date:	Controlled Matter Start
	Consolidated Matters - FamH
	Immigration Reports
	Consolidated Matters - MenH
	Consolidated Matters - TFF
	CRM 6 & CRM 11 - Contract Work Reports
	CRM 7 - NS Fee Contract Work

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

## REPORT PARAMETERS

Run

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

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 &