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



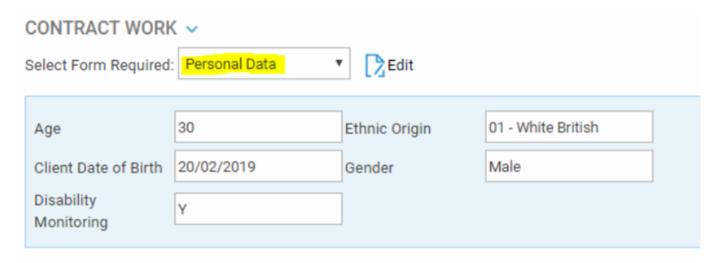
You can generate an importable CSV file for upload to the LAA portal for Civil work.

Set up the system

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

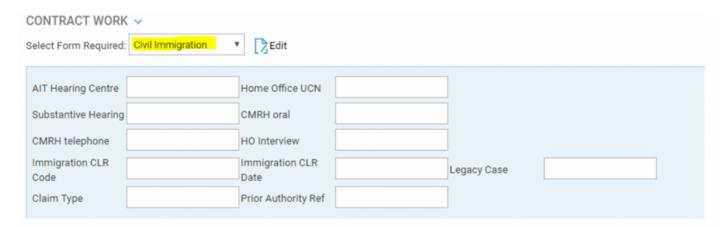
Now, ensure you have filled in the following Contract Work Pages (Case Management > Contract Work Forms):



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

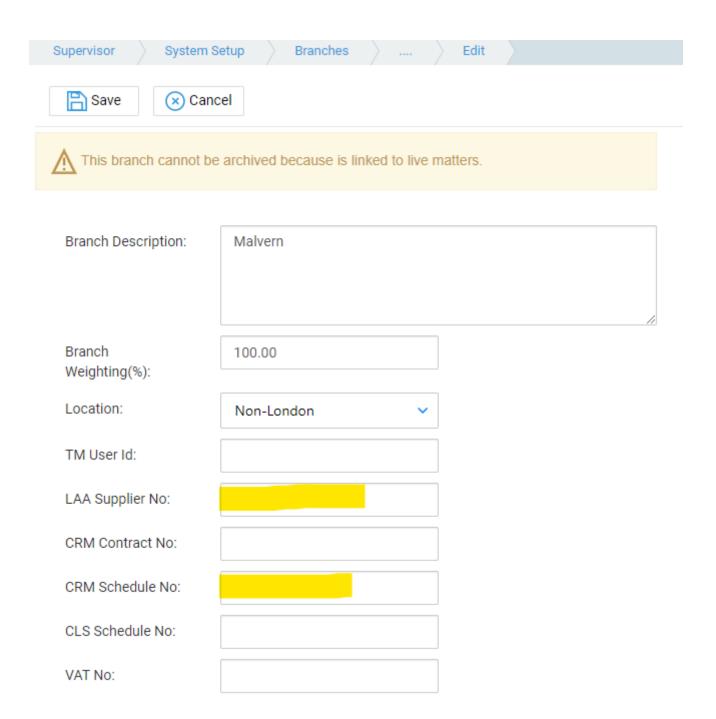
CONTRACT WORK V ▼ Edit Select Form Required: Civil Contract Work Area of Law MAT - Family Date Concluded 20/02/2019 FAMA - Divorce/Judicial Unique Client No Matter Type 1 FADV - Client is seeking & Stage Reached BA - First meeting Matter Type 2 End Point FD - Client referred to me Outcome Code 2(obsolete)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

And if relevant, depending on the type of work:



CONTRACT WORK V	
Select Form Required: Associated CLS ▼ Edit	
Class	Stage Reached
Outcome Code	Offence Code
Number of	No Police/Court
Suspects	Attendances
Police/Court Ident	Duty Solicitor
Youth Court	

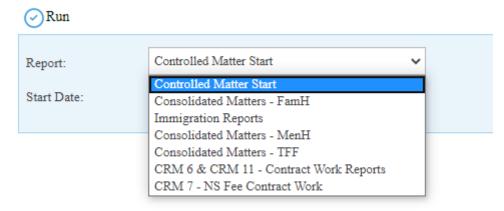
Navigate to Supervisor > System Setup > Branches and ensure that your branches have the LAA Supplier number and CLS Schedule number set:



Run the reports

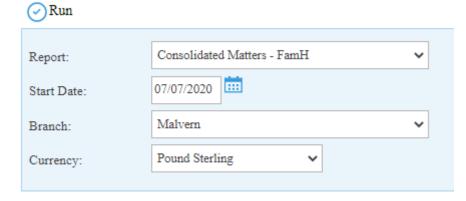
Navigate to Reports > Miscellaneous > Contract Work, and choose the report you want to print:

REPORT PARAMETERS



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

REPORT PARAMETERS



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

