



Osprey Approach: Manage Contract Work Forms list values for Legal Aid reporting

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The latest version is always online at
<https://support.ospreyapproach.com/?p=17589>

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Should the LAA introduce any new codes or take old codes out of use which are required for reporting on the CRM6 or CMRF, you can amend these codes as necessary.

Navigate to Case Management > Contract Work Forms > Manage Lists.

In the Page drop down, select the Contract Work form page that you want to check or add a value for.

Now select the field.

The screenshot shows the Osprey software interface. The top header is blue with the Osprey logo and a search bar. The sidebar on the left contains various navigation icons. The main content area is divided into sections: 'KEY PERFORMANCE INDICATOR REPORTS' with a dropdown menu, 'Available KPIs' with a dropdown menu, 'Fee Earner' with a dropdown menu, 'Chart Type' with radio buttons for 'Line' and 'Bar', 'Show Labels' with a checkbox, and 'Target' with a text input field. Below this is the 'YOUR KEY DATES' section with a refresh button and a table with columns: F/E, CLIENT, MATTER, CLIENT NAME, KEY DATE (with an up arrow), TYPE, SUP F/E?, and ASSIGN F/E. The table is currently empty with the text 'No data to display'. Below that is the 'KEY DATES ADDED BY YOU' section with a refresh button, a filter dropdown set to 'All', and another table with columns: F/E, CLIENT, MATTER, KEY DATE, TYPE (with an up arrow), and CLIENT NAME. This table is also empty with 'No data to display'.

Add New Codes

In the Manage List portion of the screen, enter the value you want to add into the New Value box, ensuring that the code part of the value is at the beginning – where reporting a CRM6, Osprey will use the first few characters for populating your online submission file. Please refrain from using / characters in these codes, for example use None rather than N/A - special characters can cause the spreadsheet to error. Click Add when you are done.

Your new value will be added to the bottom of the existing list. To move it into a new position in the list, select it from the list box, and use the up or down arrows to move it to the desired position.

Click Save Changes to ensure your new entry is saved into the list.

Case Management > Contract Work Forms > Manage Lists

SELECT PAGE AND FIELD

Go

Page: Civil Contract Work

Field: Matter Type 1

MANAGE LIST

Save Changes Add Delete Set Default Replace

New Value:

↑ Please select
AASS - Assault
AFAL - False imprisonment/wrong
AMAL - Malicious prosecution
AMIS - Misfeasance in public offic
ANEG - Negligence
↓

Default Entry: Please select

Delete Codes

If you wish to delete an entry, select it from the list box, and click Delete. Click Save Changes when you are done.

Case Management > Contract Work Forms > Manage Lists

SELECT PAGE AND FIELD

Go

Page: Civil Contract Work

Field: Matter Type 1

MANAGE LIST

Save Changes Add Delete Set Default Replace

New Value:

- MHAR - Harassment (non-franchi
- MNUI - Nuisance/trespass (non-h
- MWIL - Non-family wills
- MCON - Change of name
- MOTH - Miscellaneous Other
- XXXX - XNew Test

Default Entry: Please select

Edit Codes

If you wish to edit an entry, double click it from the list box, this will copy the detail into the New Value box. Edit the entry, and click Replace. Click Save Changes when you are done.

Case Management > Contract Work Forms > Manage Lists

SELECT PAGE AND FIELD

Go

Page: Investigations

Field: Police/Court Ident

MANAGE LIST

Save Changes Add Delete Set Default Replace

New Value:

- C25885
- C121
- test
- RD009
- NE001
- C6013A

Default Entry: Select

Set a Default Value

If you wish to set a default value for any of the form fields, select it from the list box, and click Set Default, then Save Changes. When you fill in your contract work pages, this value will be automatically populated into the relevant field.


SELECT PAGE AND FIELD

 Go

Page:

Field:

MANAGE LIST

 Save Changes



 Add

 Delete

 Set Default

 Replace

New Value:

-  C25885
- C121
- test
- RD009
- NE001
-  C6013A - BALHAM HIGH ROAD YC

Default Entry: